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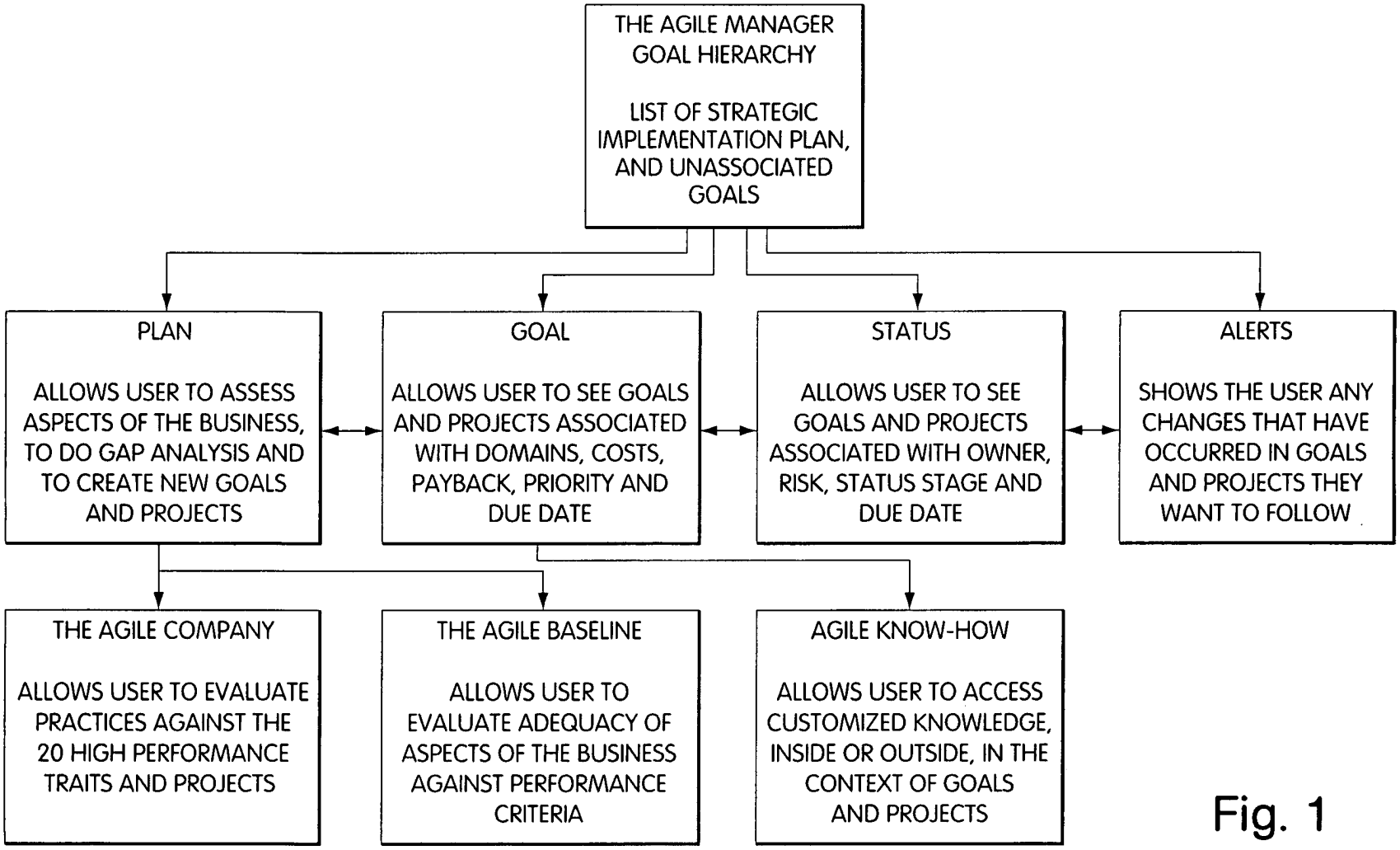

THE AGILE MANAGER GOAL HIERARCHY
LIST OF STRATEGIC IMPLEMENTATION PLAN, AND UNASSOCIATED GOALS
PLAN
ALLOWS USER TO ASSESS ASPECTS OF THE BUSINESS, TO DO GAP ANALYSIS AND TO CREATE NEW GOALS AND PROJECTS
GOAL
ALLOWS USER TO SEE GOALS AND PROJECTS ASSOCIATED WITH DOMAINS, COSTS, PAYBACK, PRIORITY AND DUE DATE
STATUS
ALLOWS USER TO SEE GOALS AND PROJECTS ASSOCIATED WITH OWNER, RISK, STATUS STAGE AND DUE DATE
ALERTS
SHOWS THE USER ANY CHANGES THAT HAVE OCCURRED IN GOALS AND PROJECTS THEY WANT TO FOLLOW
THE AGILE COMPANY
ALLOWS USER TO EVALUATE PRACTICES AGAINST THE 20 HIGH PERFORMANCE TRAITS AND PROJECTS
THE AGILE BASELINE
ALLOWS USER TO EVALUATE ADEQUACY OF ASPECTS OF THE BUSINESS AGAINST PERFORMANCE CRITERIA
AGILE KNOW-HOW
ALLOWS USER TO ACCESS CUSTOMIZED KNOWLEDGE, INSIDE OR OUTSIDE, IN THE CONTEXT OF GOALS AND PROJECTS

Fig. 1

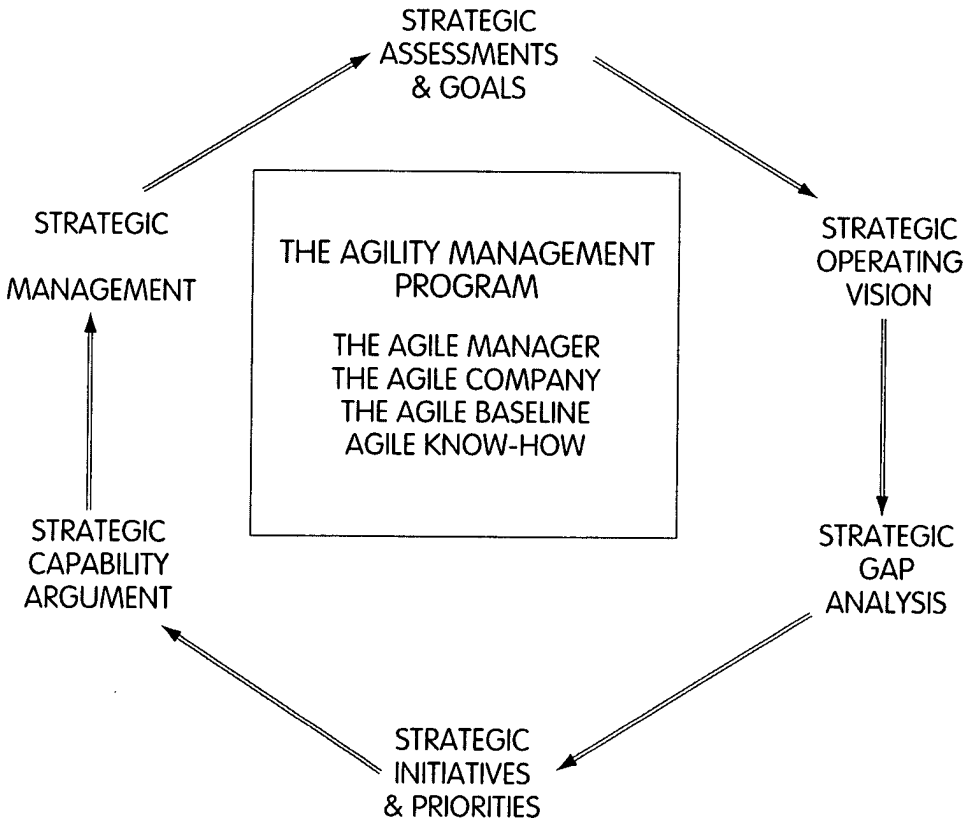
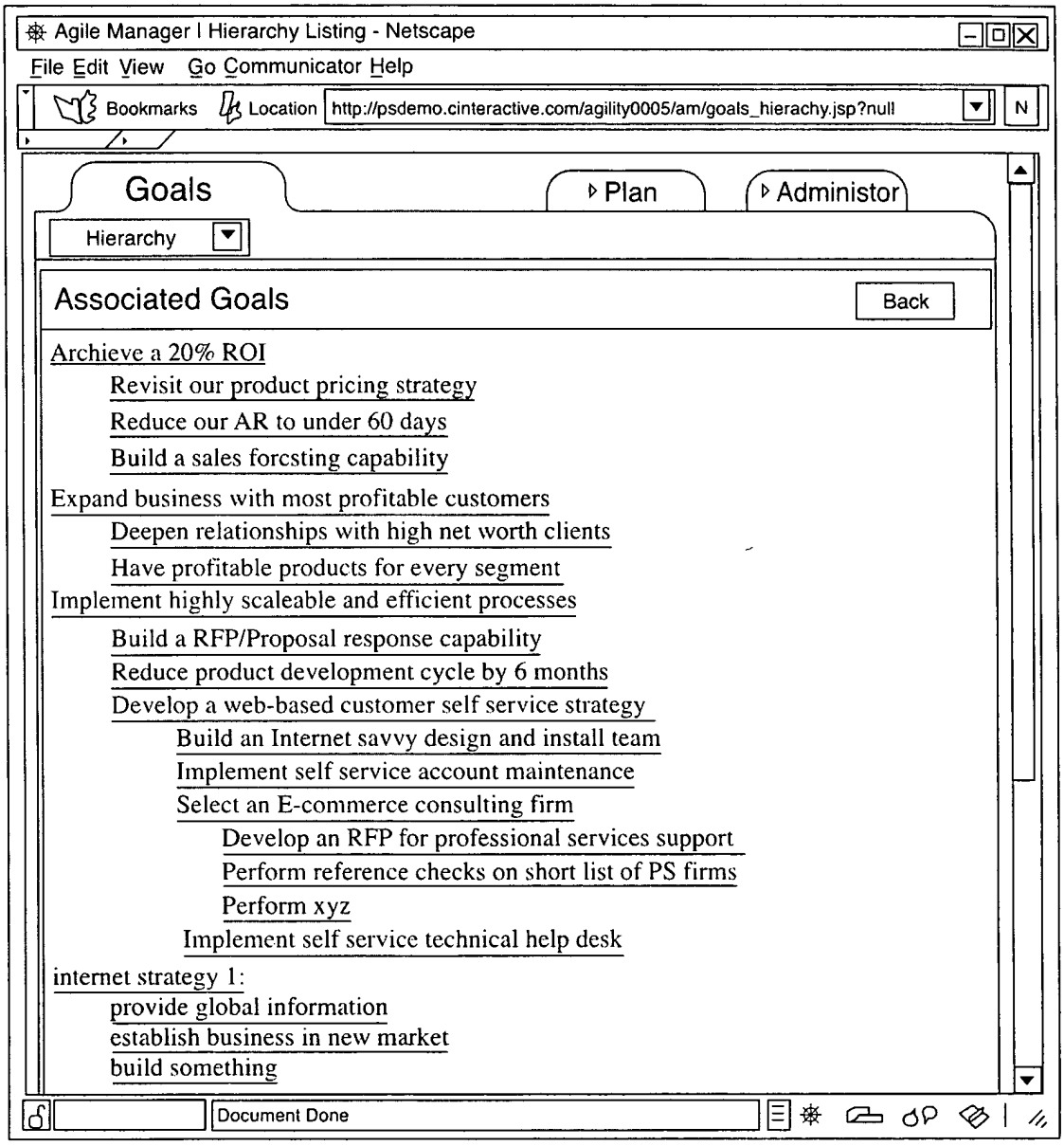

STRATEGIC ASSESSMENTS & GOALS
STRATEGIC OPERATING VISION
STRATEGIC GAP ANALYSIS
STRATEGIC INITIATIVES & PRIORITIES
STRATEGIC CAPABILITY ARGUMENT
STRATEGIC MANAGEMENT
THE AGILITY MANAGEMENT PROGRAM
THE AGILE MANAGER
THE AGILE COMPANY
THE AGILE BASELINE
AGILE KNOW-HOW

Fig. 2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N
Goals
Plan
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Hierarchy
Associated Goals
Back
Archieve a 20% ROI
Revisit our product pricing strategy
Reduce our AR to under 60 days
Build a sales forcsting capability
Expand business with most profitable customers
Deepen relationships with high net worth clients
Have profitable products for every segment
Implement highly scaleable and efficient processes
Build a RFP/Proposal response capability
Reduce product development cycle by 6 months
Develop a web-based customer self service strategy
Build an Internet savvy design and install team
Implement self service account maintenance
Select an E-commerce consulting firm
Develop an RFP for professional services support
Perform reference checks on short list of PS firms
Perform xyz
Implement self service technical help desk
internet strategy 1:
provide global information
establish business in new market
build something
Document Done

Fig. 3

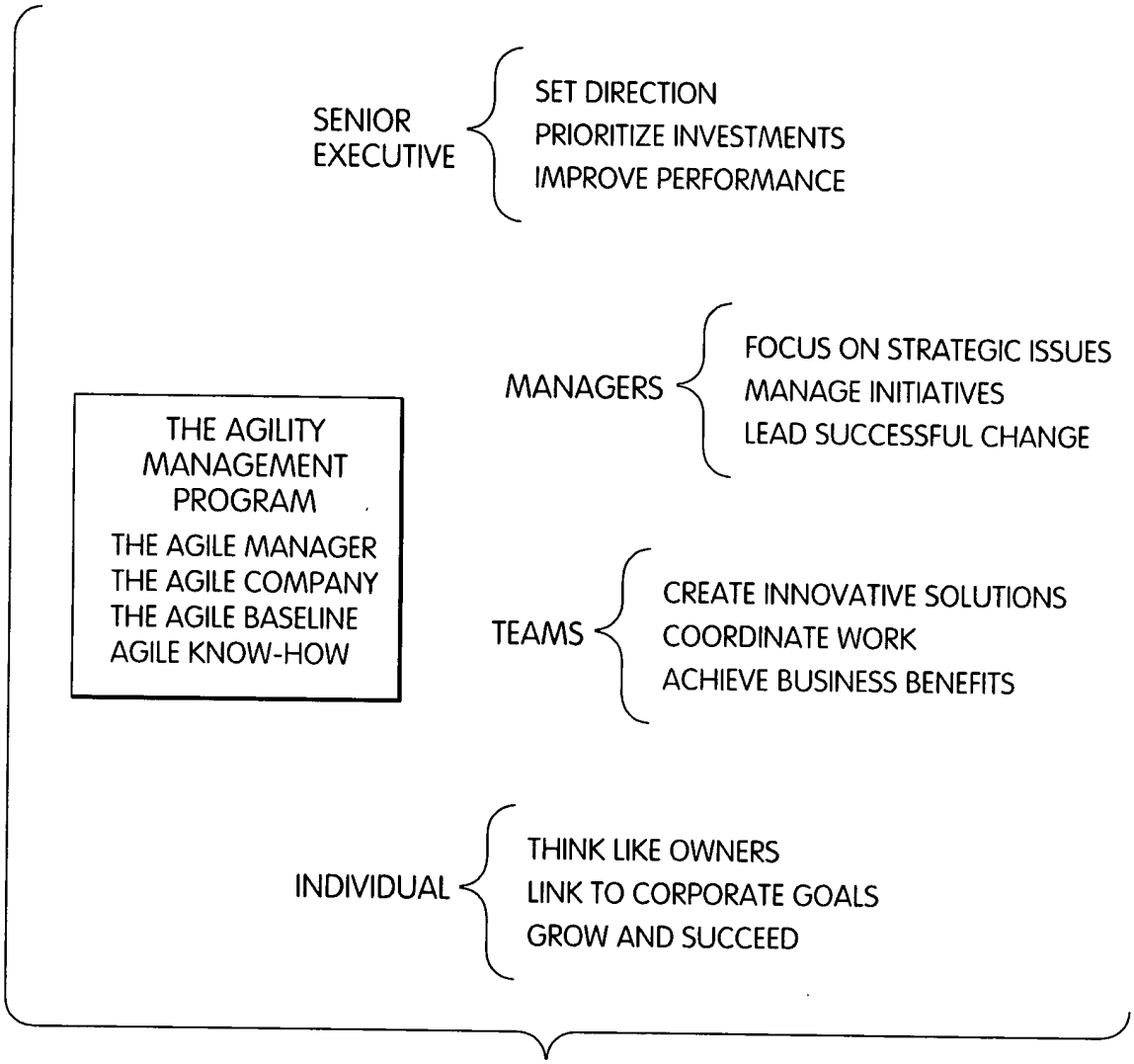

SENIOR EXECUTIVE
SET DIRECTION
PRIORITIZE INVESTMENTS
IMPROVE PERFORMANCE
MANAGERS
FOCUS ON STRATEGIC ISSUES
MANAGE INITIATIVES
LEAD SUCCESSFUL CHANGE
THE AGILITY MANAGEMENT PROGRAM
THE AGILE MANAGER
THE AGILE COMPANY
THE AGILE BASELINE
AGILE KNOW-HOW
TEAMS
CREATE INNOVATIVE SOLUTIONS
COORDINATE WORK
ACHIEVE BUSINESS BENEFITS
INDIVIDUAL
THINK LIKE OWNERS
LINK TO CORPORATE GOALS
GROW AND SUCCEED

Fig. 4

RESEARCH BASED DIAGNOSTICS REDUCE
ORGANIZATIONAL BARRIERS

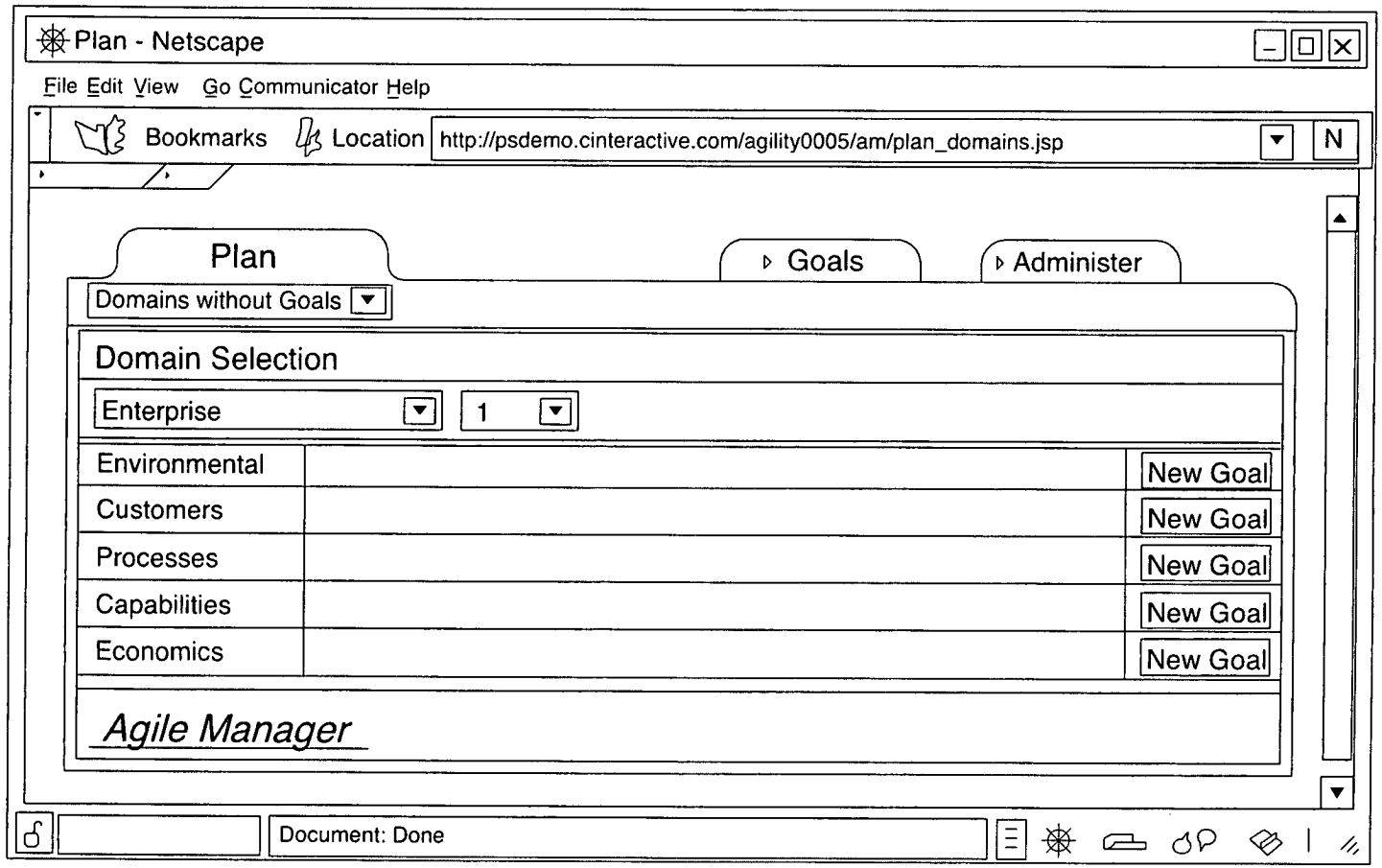
ENTERPRISE

- "HARD-WIRED" TO CUSTOMER NEEDS/BEHAVIORS
- INFECTIOUS, IMPROVEMENT-DRIVEN LEADERSHIP
- VISIONARY LEADERSHIP WITH CRYSTAL CLEAR COMMUNICATION
- EMPLOYEES ACT LIKE/TREATED LIKE OWNERS
- ACTION FOCUSED INNOVATION/RISK TAKING REWARDED
- VALUE BASED DECISION MAKING AT LOWEST LEVEL
- ADAPTIVE CULTURE, REVOLUTIONARY WHEN NECESSARY
- DRIVEN TO EXCEL; "GOOD ENOUGH NEVER IS"
- RELENTLESS COMMITMENT TO LOWER COST AND HIGHER QUALITY
- BOUNDARYLESS, BY WELL MANAGED STRUCTURES
- TIME/RESOURCES FOCUS ON HIGH VALUE INITIATIVES
- SYSTEMATIC, OPPORTUNISTIC STRATEGIES THAT ADAPT
- CONCENTRATE WHERE THE BUSINESS LEVERAGE IS
- EXACTING EXECUTION WITH RELIABLE RESULTS
- INFORMATION/KNOWLEDGE ACCESSIBLE AS NEEDED

MANAGEMENT TEAM

- FOCUSING ON THE HIGHEST GAIN STRATEGIC INITIATIVES:
  - CREATING A PORTFOLIO OF HIGH LEVERAGE INITIATIVES
  - REPRIORITIZING THE PORTFOLIO AS THINGS CHANGE
  - REVIEWING NEW/OLD INITIATIVES FOR ROI IMPACT
- REDUCING ORGANIZATIONAL BARRIERS TO SUCCESS:
  - DETERMINING FACTORS CRITICAL FOR SUCCESS
  - IDENTIFYING KEY RISKS TO BE MANAGED PROACTIVELY
  - MAKING ADJUSTMENTS TO ELIMINATE KEY BARRIERS
- APPLYING MANAGEMENT TALENT ON THE RIGHT THINGS:
  - REINFORCING STRATEGIC GOALS USING STRUCTURED COMMUNICATION
  - GETTING SUBSTANCE FROM MANAGEMENT MEETINGS
  - FOCUSING MANAGEMENT ATTENTION ON THE HIGH LEVERAGE ITEMS
- EQUIPPING LEADERS TO SUCCEED:
  - LEARNING TO THINK LIKE OWNERS
  - GETTING THE MOST FROM INTERDISCIPLINARY TEAMS
  - MANAGING PROJECT RISK TO VALUE

Fig. 5


Plan - Netscape
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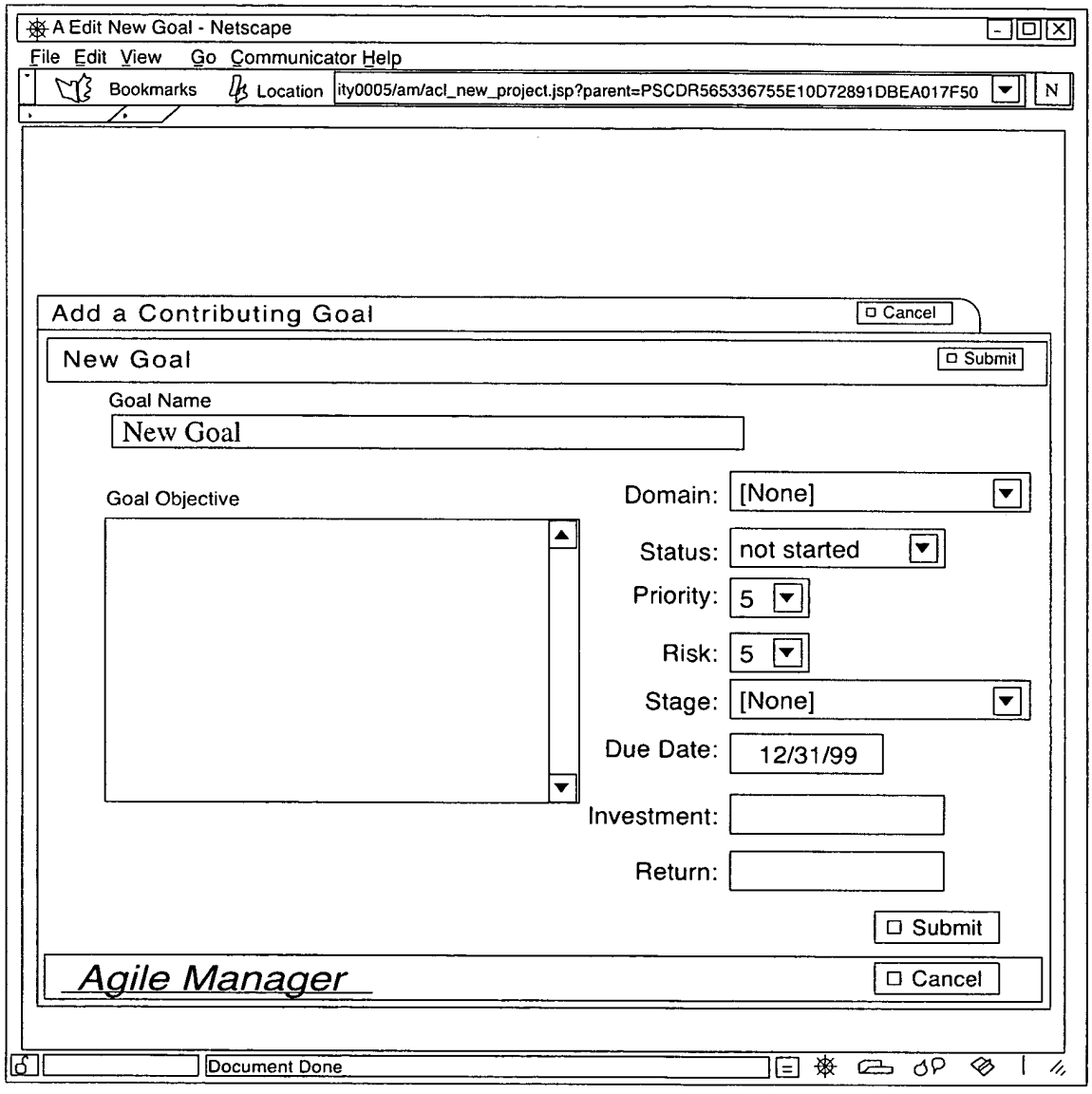
Environmental
Customers
Processes
Capabilities
Economics
New Goal
New Goal
New Goal
New Goal
New Goal
Agile Manager
Document: Done

Fig. 6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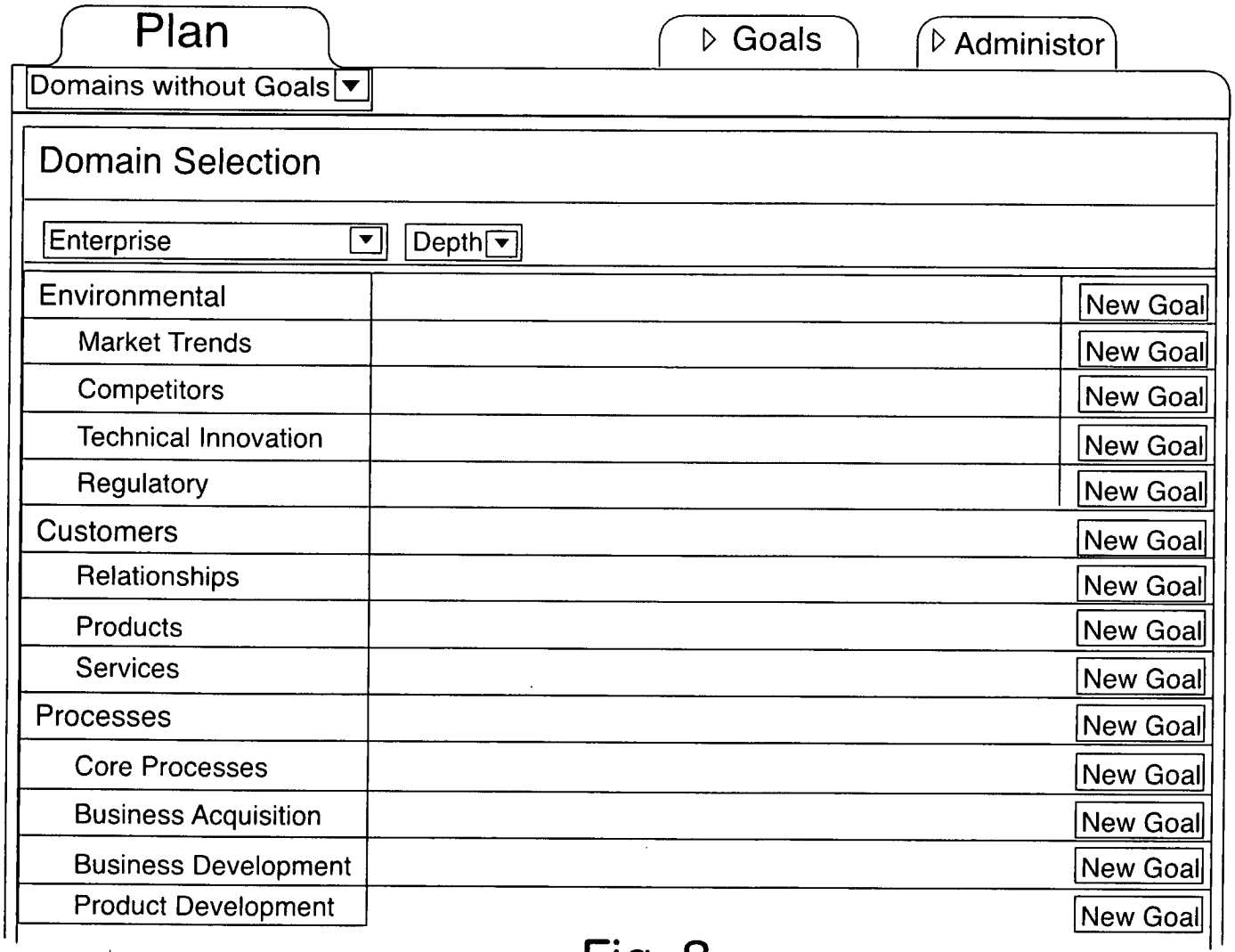
N
Add a Contributing Goal
Cancel
New Goal
Submit
Goal Name
New Goal
Goal Objective
Domain: [None]
Status: not started
Priority: 5
Risk: 5
Stage: [None]
Due Date: 12/31/99
Investment:
Return:
Submit
Agile Manager
Cancel
Document Done

Fig. 7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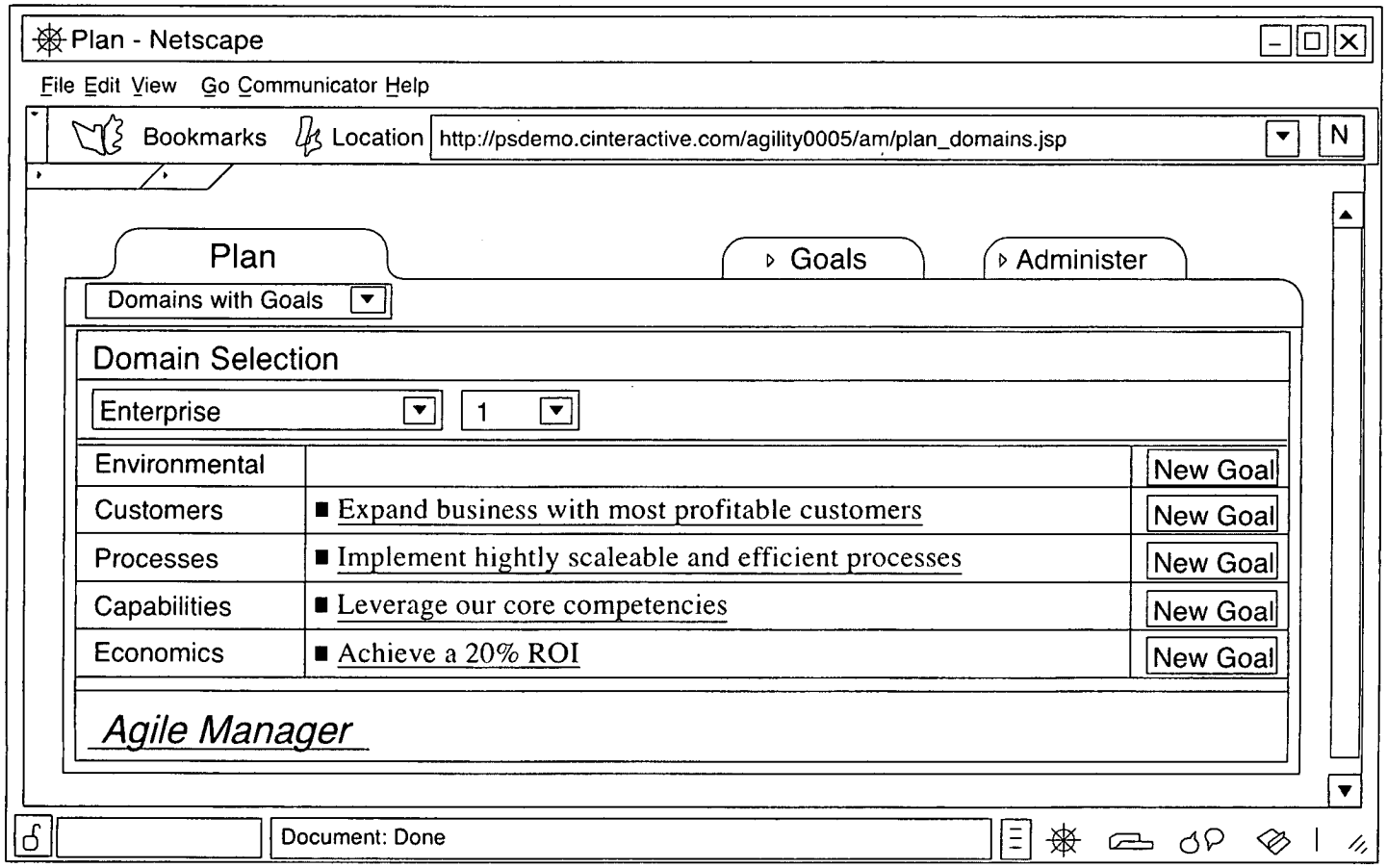
Domain Selection
Enterprise
Depth
Environmental
Market Trends
Competitors
Technical Innovation
Regulatory
Customers
Relationships
Products
Services
Processes
Core Processes
Business Acquisition
Business Development
Product Development
New Goal

Fig. 8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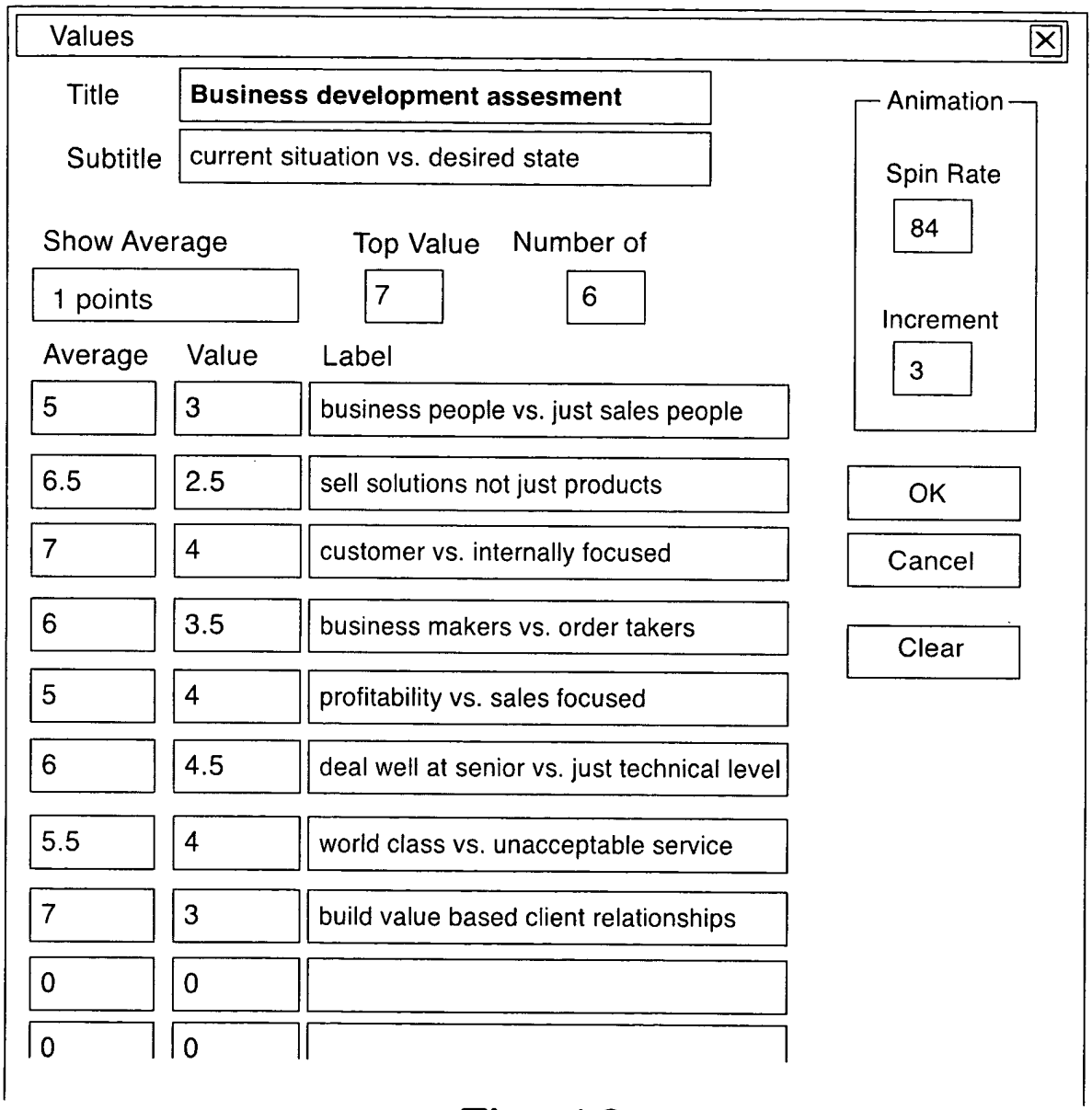
Domain Selection
Enterprise
1
Environmental
New Goal
Customers
Expand business with most profitable customers
New Goal
Processes
Implement hightly scaleable and efficient processes
New Goal
Capabilities
Leverage our core competencies
New Goal
Economics
Achieve a 20% ROI
New Goal
Agile Manager
Document: Done

Fig. 9


Values
Title
Business development assesment
Subtitle
current situation vs. desired state
Animation
Spin Rate
84
Increment
3
Show Average
1 points
Top Value
7
Number of
6
Average
Value
Label
5
3
business people vs. just sales people
6.5
2.5
sell solutions not just products
7
4
customer vs. internally focused
6
3.5
business makers vs. order takers
5
4
profitability vs. sales focused
6
4.5
deal well at senior vs. just technical level
5.5
4
world class vs. unacceptable service
7
3
build value based client relationships
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OK
Cancel
Clear

Fig. 10

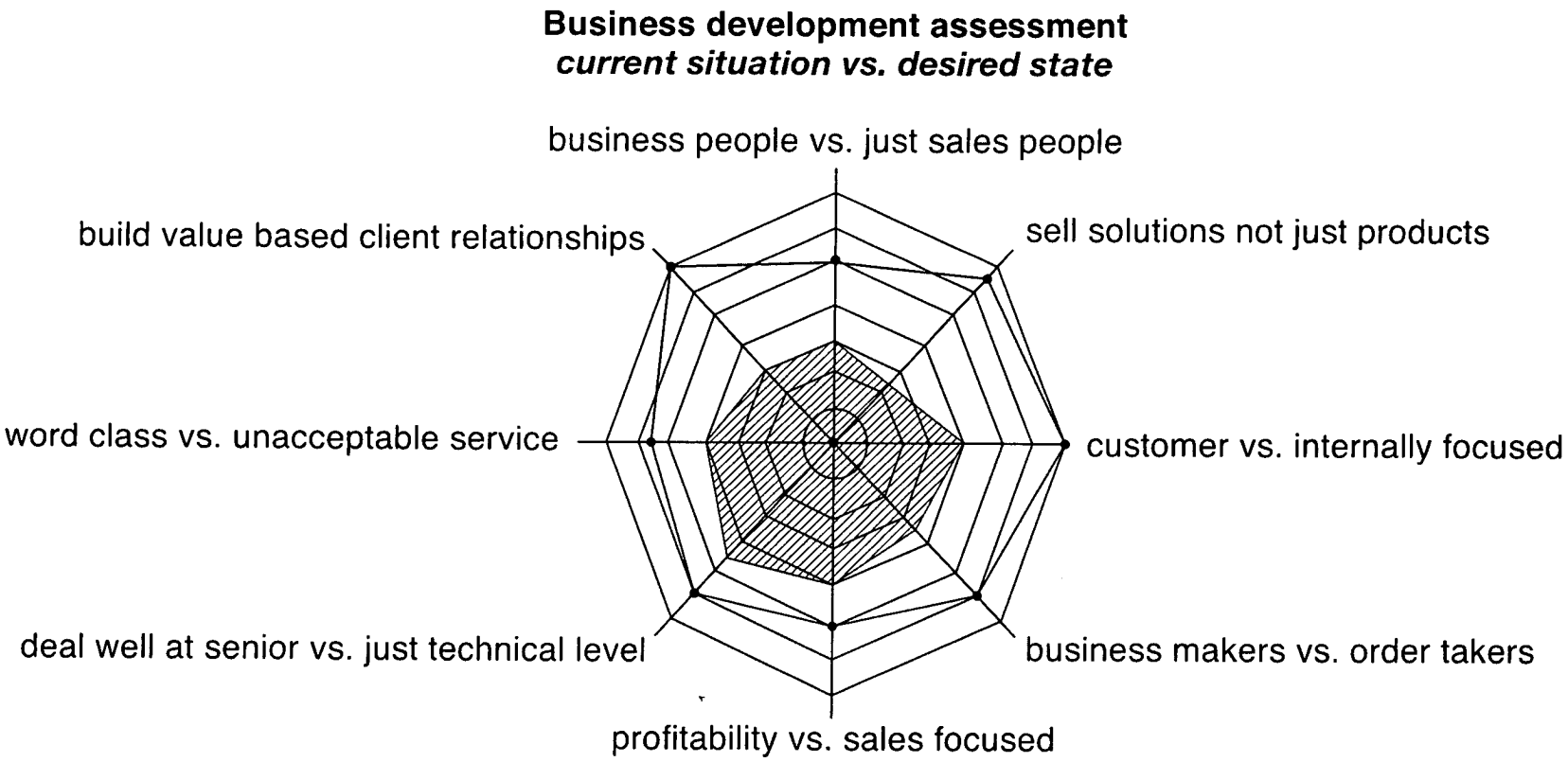
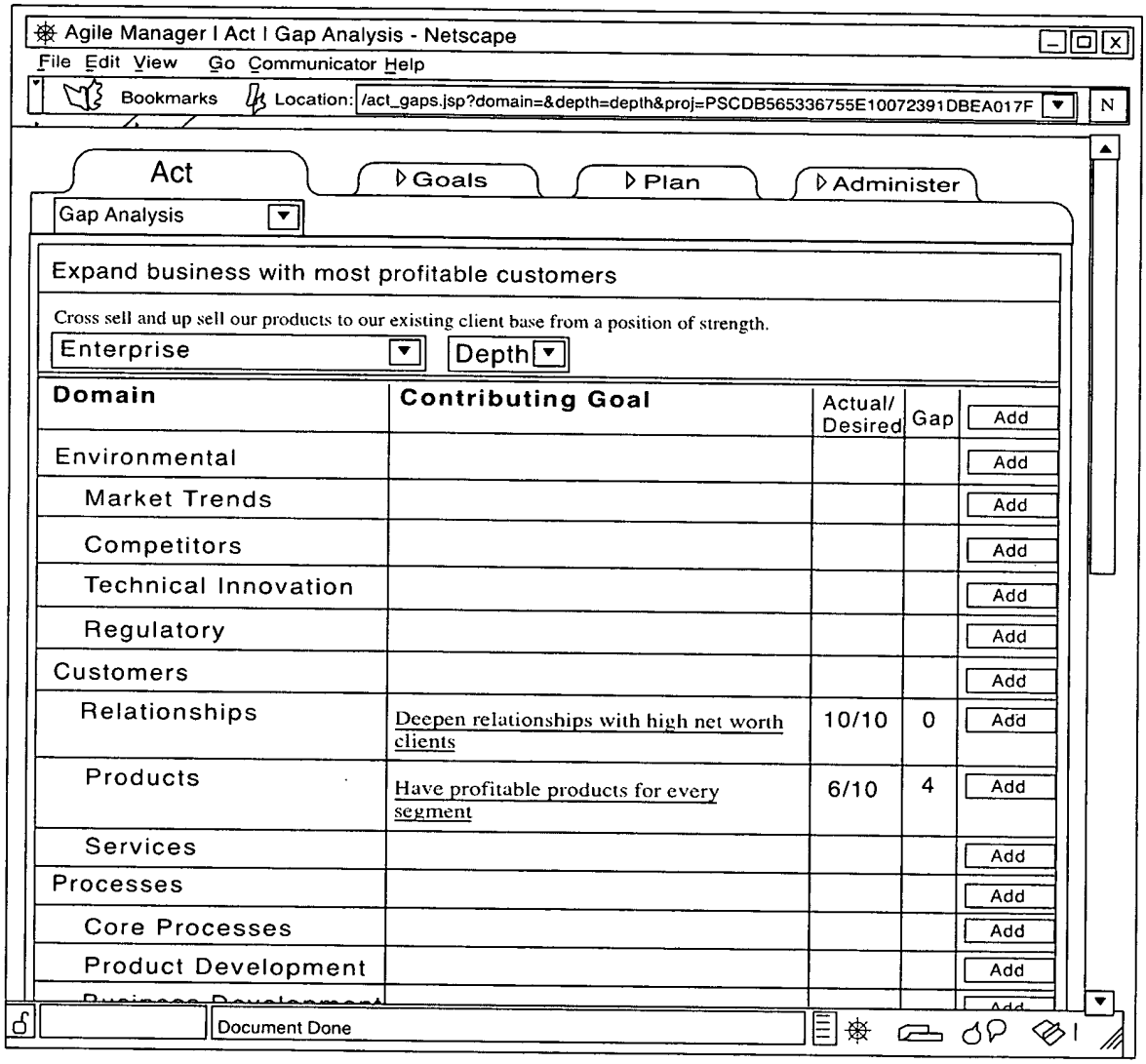

Business development assessment
current situation vs. desired state
business people vs. just sales people
sell solutions not just products
customer vs. internally focused
business makers vs. order takers
profitability vs. sales focused
deal well at senior vs. just technical level
word class vs. unacceptable service
build value based client relationships

Fig. 11


Agile Manager I Act I Gap Analysis - Netscape
File Edit View Go Communicator Help
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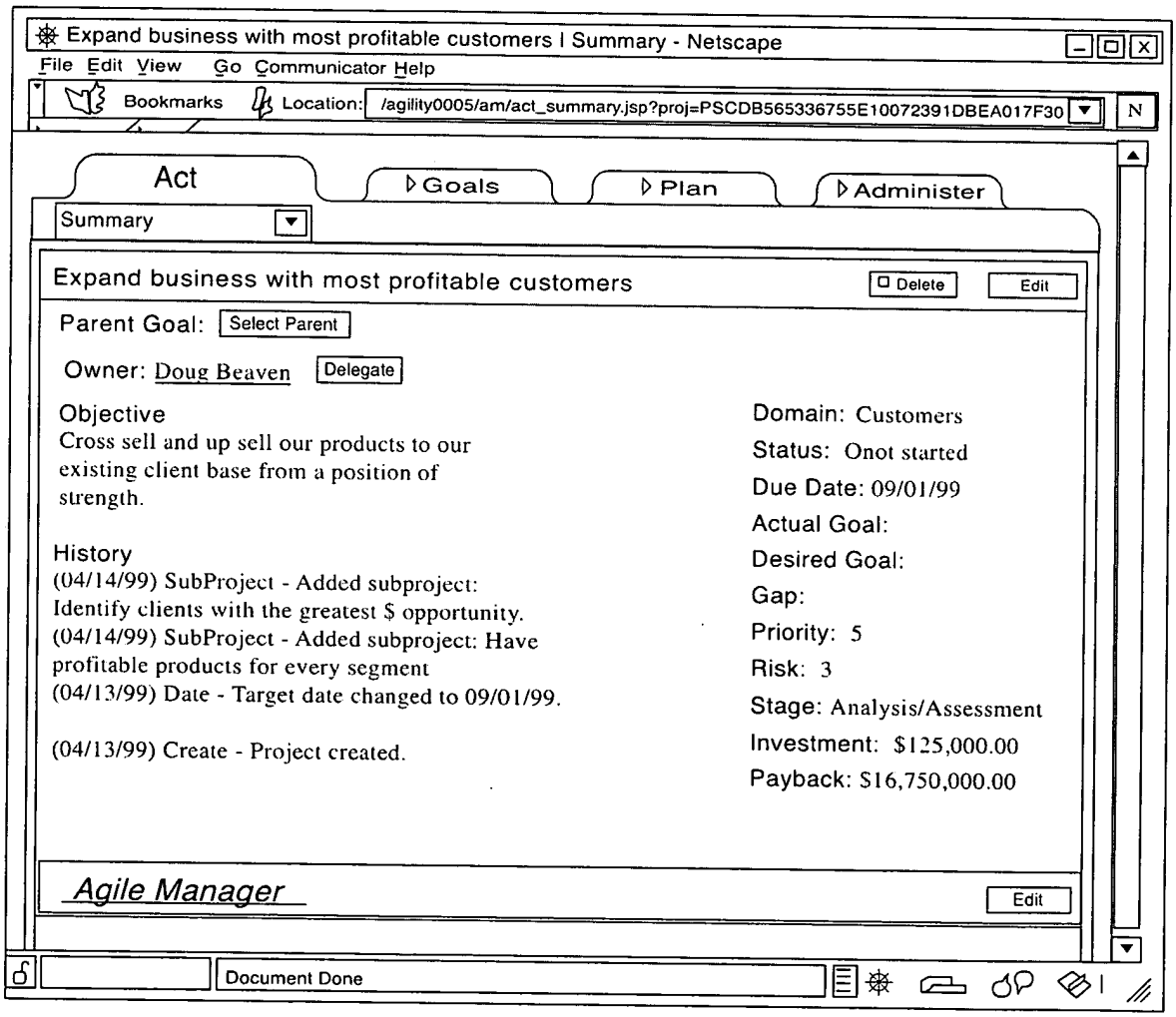
Act
Goals
Plan
Administer
Gap Analysis
Expand business with most profitable customers
Cross sell and up sell our products to our existing client base from a position of strength.
Enterprise
Depth
Domain
Contributing Goal
Actual/ Desired
Gap
Add
Environmental
Market Trends
Competitors
Technical Innovation
Regulatory
Customers
Relationships
Deepen relationships with high net worth clients
10/10
0
Products
Have profitable products for every segment
6/10
4
Services
Processes
Core Processes
Product Development
Document Done

Fig. 12


Expand business with most profitable customers | Summary - Netscape
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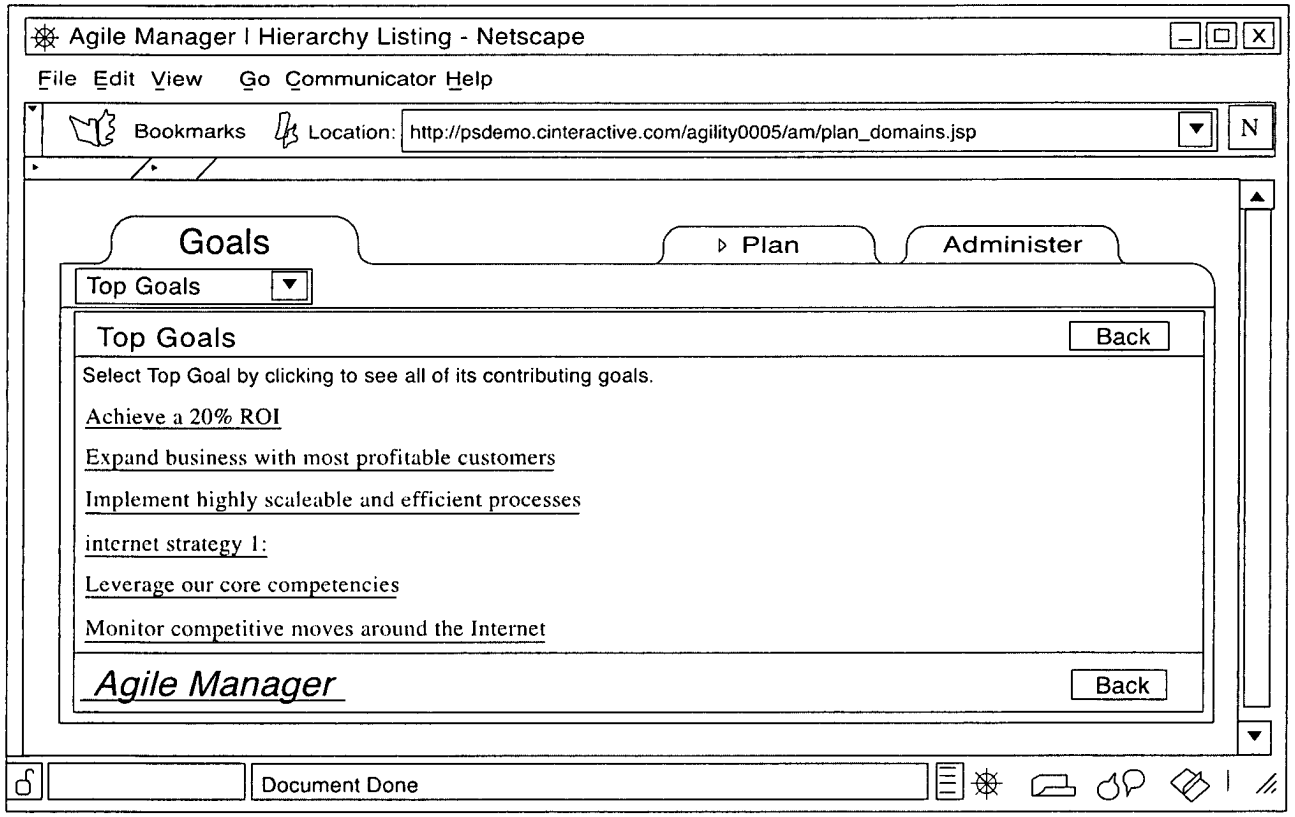
Bookmarks Location: /agility0005/am/act_summary.jsp?proj=PSCDB565336755E10072391DBEA017F30
Act
Goals
Plan
Administer
Summary
Expand business with most profitable customers
Delete
Edit
Parent Goal: Select Parent
Owner: Doug Beaven Delegate
Objective
Cross sell and up sell our products to our existing client base from a position of strength.
History
(04/14/99) SubProject - Added subproject: Identify clients with the greatest $ opportunity.
(04/14/99) SubProject - Added subproject: Have profitable products for every segment
(04/13/99) Date - Target date changed to 09/01/99.
(04/13/99) Create - Project created.
Domain: Customers
Status: Onot started
Due Date: 09/01/99
Actual Goal:
Desired Goal:
Gap:
Priority: 5
Risk: 3
Stage: Analysis/Assessment
Investment: $125,000.00
Payback: $16,750,000.00
Agile Manager
Edit
Document Done

Fig. 13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N
Goals
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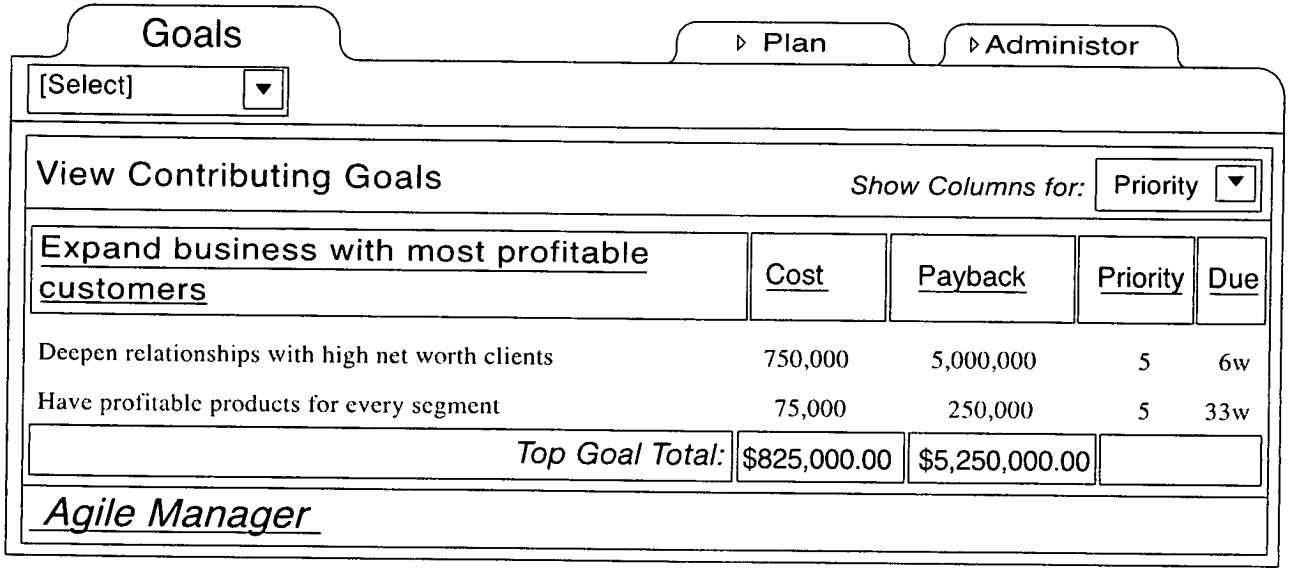
Top Goals
Top Goals
Back
Select Top Goal by clicking to see all of its contributing goals.
Achieve a 20% ROI
Expand business with most profitable customers
Implement highly scaleable and efficient processes
internet strategy 1:
Leverage our core competencies
Monitor competitive moves around the Internet
Agile Manager
Back
Document Done

Fig. 14


Goals
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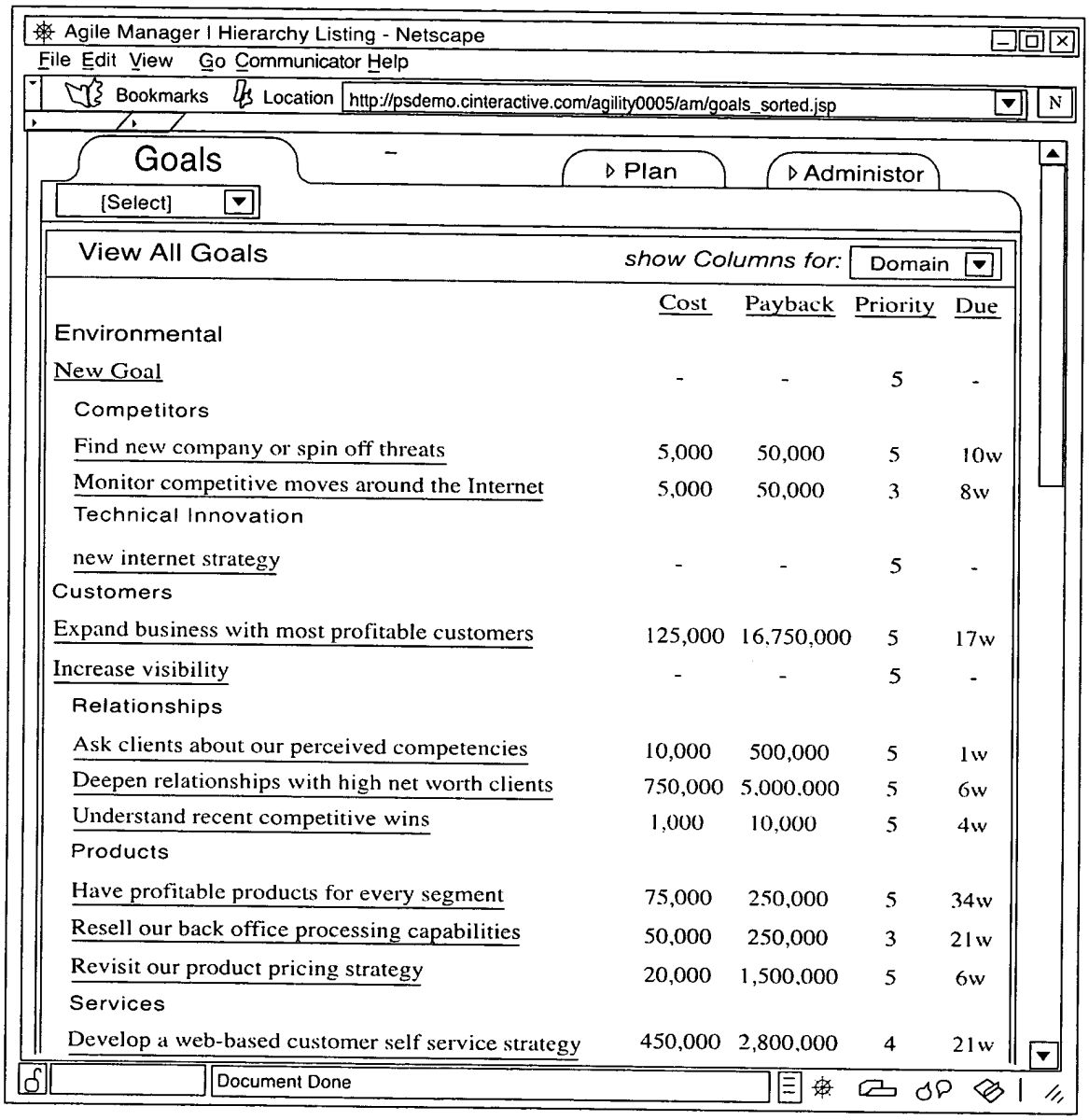
[Select]
View Contributing Goals
Show Columns for:
Priority
Expand business with most profitable customers
Cost
Payback
Priority
Due
Deepen relationships with high net worth clients
750,000
5,000,000
5
6w
Have profitable products for every segment
75,000
250,000
5
33w
Top Goal Total:
$825,000.00
$5,250,000.00
Agile Manager

Fig. 15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Goals
Plan
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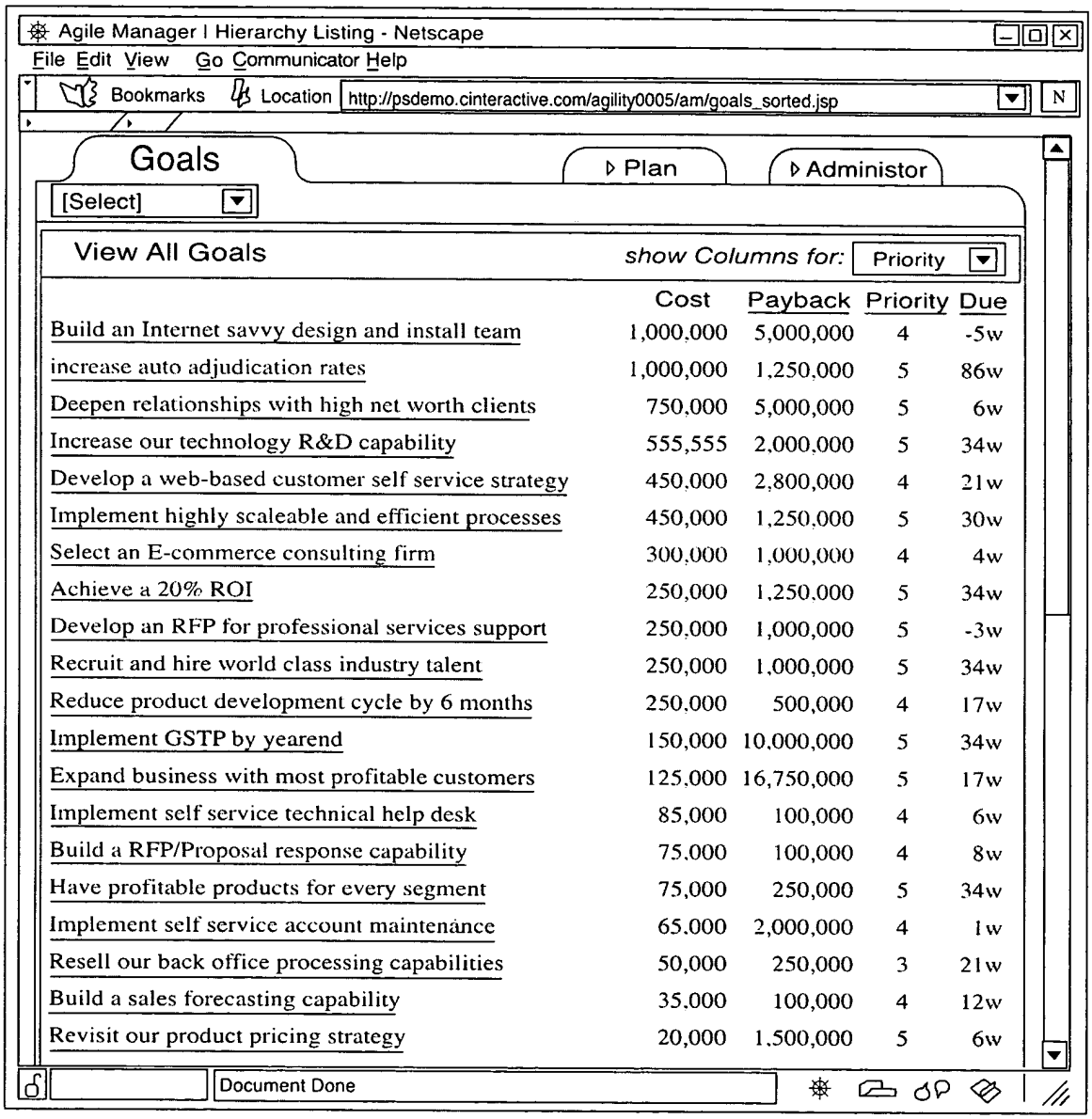
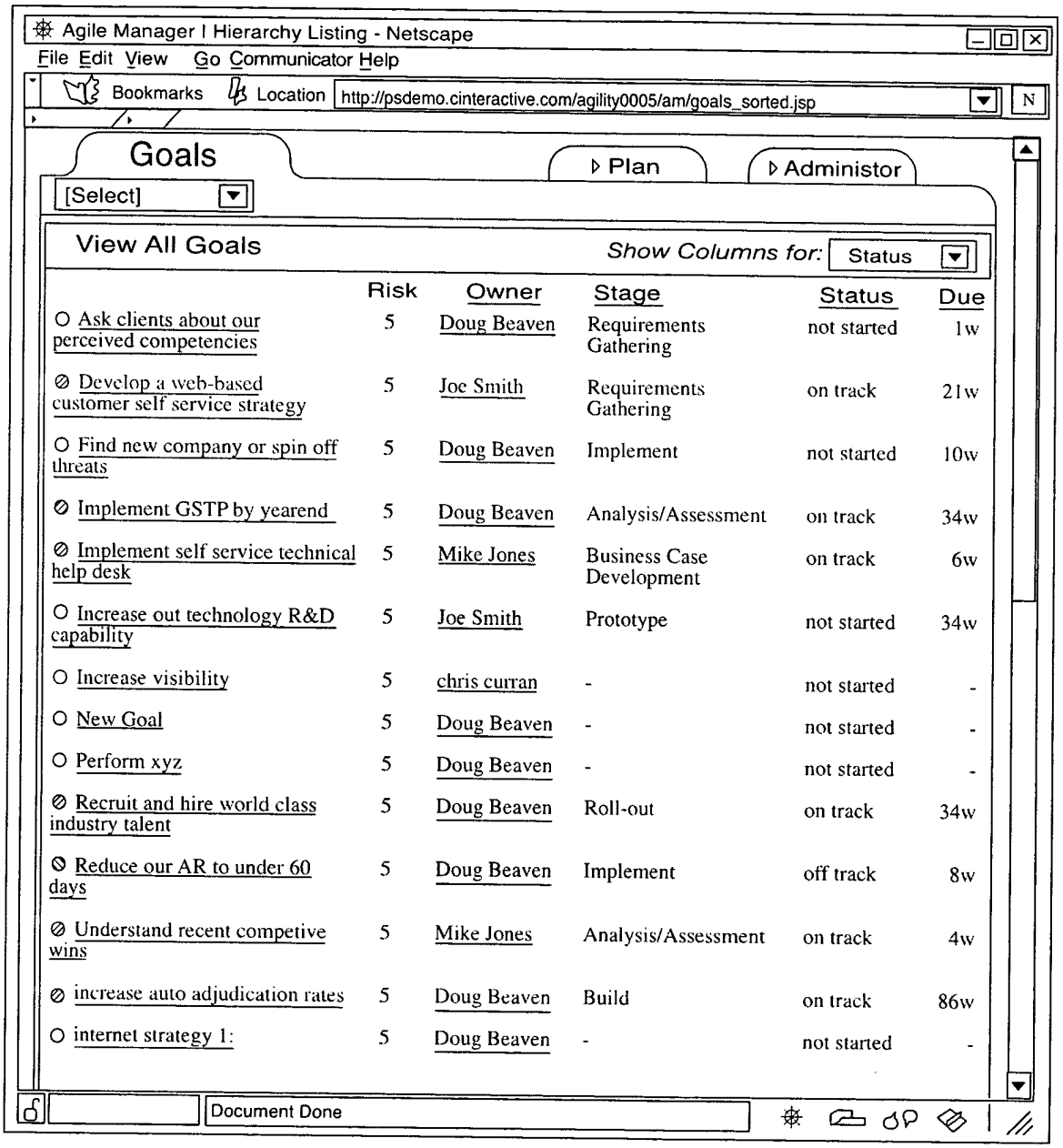
View All Goals
show Columns for: Domain
Cost Payback Priority Due
Environmental
New Goal - - 5 -
Competitors
Find new company or spin off threats 5,000 50,000 5 10w
Monitor competitive moves around the Internet 5,000 50,000 3 8w
Technical Innovation
new internet strategy - - 5 -
Customers
Expand business with most profitable customers 125,000 16,750,000 5 17w
Increase visibility - - 5 -
Relationships
Ask clients about our perceived competencies 10,000 500,000 5 1w
Deepen relationships with high net worth clients 750,000 5,000,000 5 6w
Understand recent competitive wins 1,000 10,000 5 4w
Products
Have profitable products for every segment 75,000 250,000 5 34w
Resell our back office processing capabilities 50,000 250,000 3 21w
Revisit our product pricing strategy 20,000 1,500,000 5 6w
Services
Develop a web-based customer self service strategy 450,000 2,800,000 4 21w
Document Done

Fig. 16



	Cost	Payback	Priority	Due
Build an Internet savvy design and install team	1,000,000	5,000,000	4	-5w
increase auto adjudication rates	1,000,000	1,250,000	5	86w
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Increase our technology R&D capability	555,555	2,000,000	5	34w
Develop a web-based customer self service strategy	450,000	2,800,000	4	21w
Implement highly scaleable and efficient processes	450,000	1,250,000	5	30w
Select an E-commerce consulting firm	300,000	1,000,000	4	4w
Achieve a 20% ROI	250,000	1,250,000	5	34w
Develop an RFP for professional services support	250,000	1,000,000	5	-3w
Recruit and hire world class industry talent	250,000	1,000,000	5	34w
Reduce product development cycle by 6 months	250,000	500,000	4	17w
Implement GSTP by yearend	150,000	10,000,000	5	34w
Expand business with most profitable customers	125,000	16,750,000	5	17w
Implement self service technical help desk	85,000	100,000	4	6w
Build a RFP/Proposal response capability	75,000	100,000	4	8w
Have profitable products for every segment	75,000	250,000	5	34w
Implement self service account maintenance	65,000	2,000,000	4	1w
Resell our back office processing capabilities	50,000	250,000	3	21w
Build a sales forecasting capability	35,000	100,000	4	12w
Revisit our product pricing strategy	20,000	1,500,000	5	6w

Fig. 17


Agile Manager I Hierarchy Listing - Netscape
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Goals
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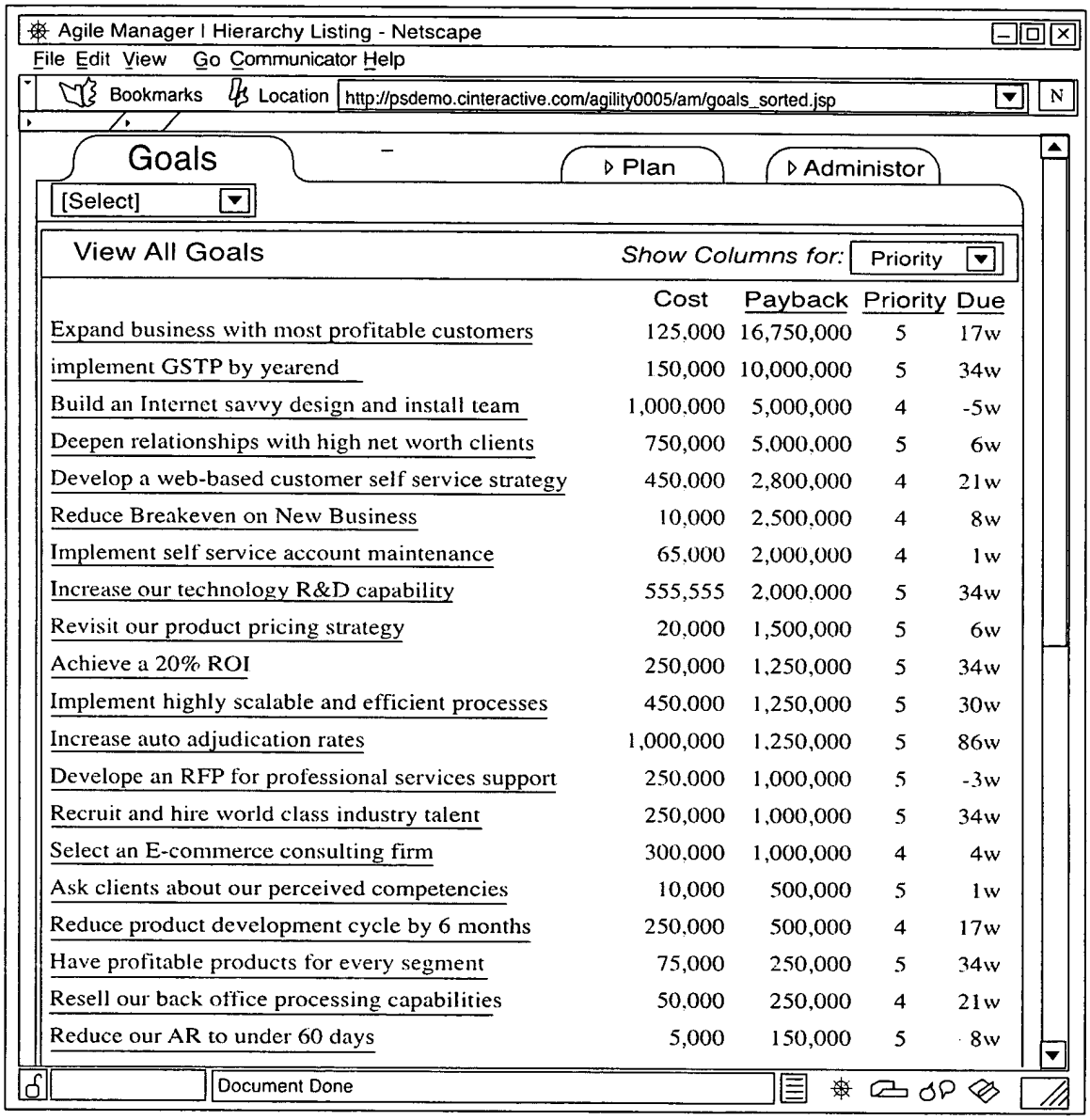
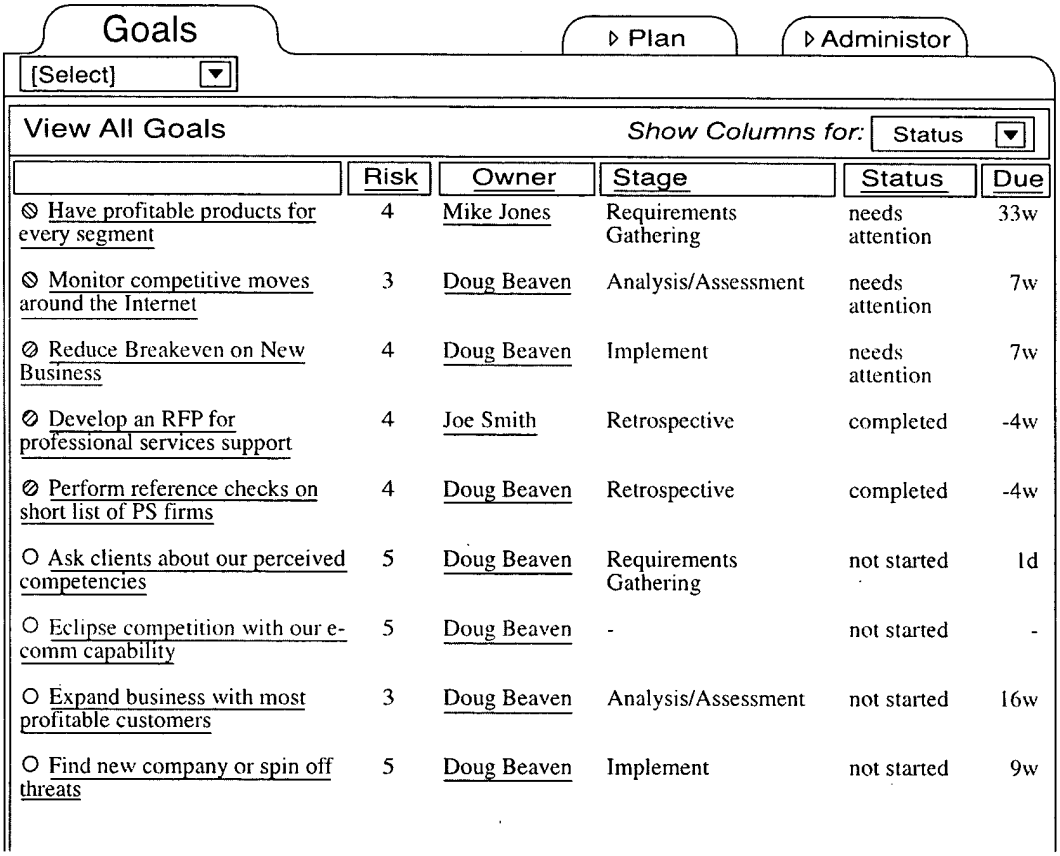
View All Goals
Show Columns for: Status
Risk Owner Stage Status Due
Ask clients about our perceived competencies 5 Doug Beaven Requirements Gathering not started 1w
Develop a web-based customer self service strategy 5 Joe Smith Requirements Gathering on track 21w
Find new company or spin off threats 5 Doug Beaven Implement not started 10w
Implement GSTP by yearend 5 Doug Beaven Analysis/Assessment on track 34w
Implement self service technical help desk 5 Mike Jones Business Case Development on track 6w
Increase out technology R&D capability 5 Joe Smith Prototype not started 34w
Increase visibility 5 chris curran - not started -
New Goal 5 Doug Beaven - not started -
Perform xyz 5 Doug Beaven - not started -
Recruit and hire world class industry talent 5 Doug Beaven Roll-out on track 34w
Reduce our AR to under 60 days 5 Doug Beaven Implement off track 8w
Understand recent competive wins 5 Mike Jones Analysis/Assessment on track 4w
increase auto adjudication rates 5 Doug Beaven Build on track 86w
internet strategy 1: 5 Doug Beaven - not started -
Document Done

Fig. 18



	Cost	Payback	Priority	Due
Expand business with most profitable customers	125,000	16,750,000	5	17w
implement GSTP by yearend	150,000	10,000,000	5	34w
Build an Internet savvy design and install team	1,000,000	5,000,000	4	-5w
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Develop a web-based customer self service strategy	450,000	2,800,000	4	21w
Reduce Breakeven on New Business	10,000	2,500,000	4	8w
Implement self service account maintenance	65,000	2,000,000	4	1w
Increase our technology R&D capability	555,555	2,000,000	5	34w
Revisit our product pricing strategy	20,000	1,500,000	5	6w
Achieve a 20% ROI	250,000	1,250,000	5	34w
Implement highly scalable and efficient processes	450,000	1,250,000	5	30w
Increase auto adjudication rates	1,000,000	1,250,000	5	86w
Develope an RFP for professional services support	250,000	1,000,000	5	-3w
Recruit and hire world class industry talent	250,000	1,000,000	5	34w
Select an E-commerce consulting firm	300,000	1,000,000	4	4w
Ask clients about our perceived competencies	10,000	500,000	5	1w
Reduce product development cycle by 6 months	250,000	500,000	4	17w
Have profitable products for every segment	75,000	250,000	5	34w
Resell our back office processing capabilities	50,000	250,000	4	21w
Reduce our AR to under 60 days	5,000	150,000	5	8w

Fig. 19



	Risk	Owner	Stage	Status	Due
⦸ Have profitable products for every segment	4	Mike Jones	Requirements Gathering	needs attention	33w
⦸ Monitor competitive moves around the Internet	3	Doug Beaven	Analysis/Assessment	needs attention	7w
⊘ Reduce Breakeven on New Business	4	Doug Beaven	Implement	needs attention	7w
⊘ Develop an RFP for professional services support	4	Joe Smith	Retrospective	completed	-4w
⊘ Perform reference checks on short list of PS firms	4	Doug Beaven	Retrospective	completed	-4w
○ Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1d
○ Eclipse competition with our e-comm capability	5	Doug Beaven	-	not started	-
○ Expand business with most profitable customers	3	Doug Beaven	Analysis/Assessment	not started	16w
○ Find new company or spin off threats	5	Doug Beaven	Implement	not started	9w

Fig. 20

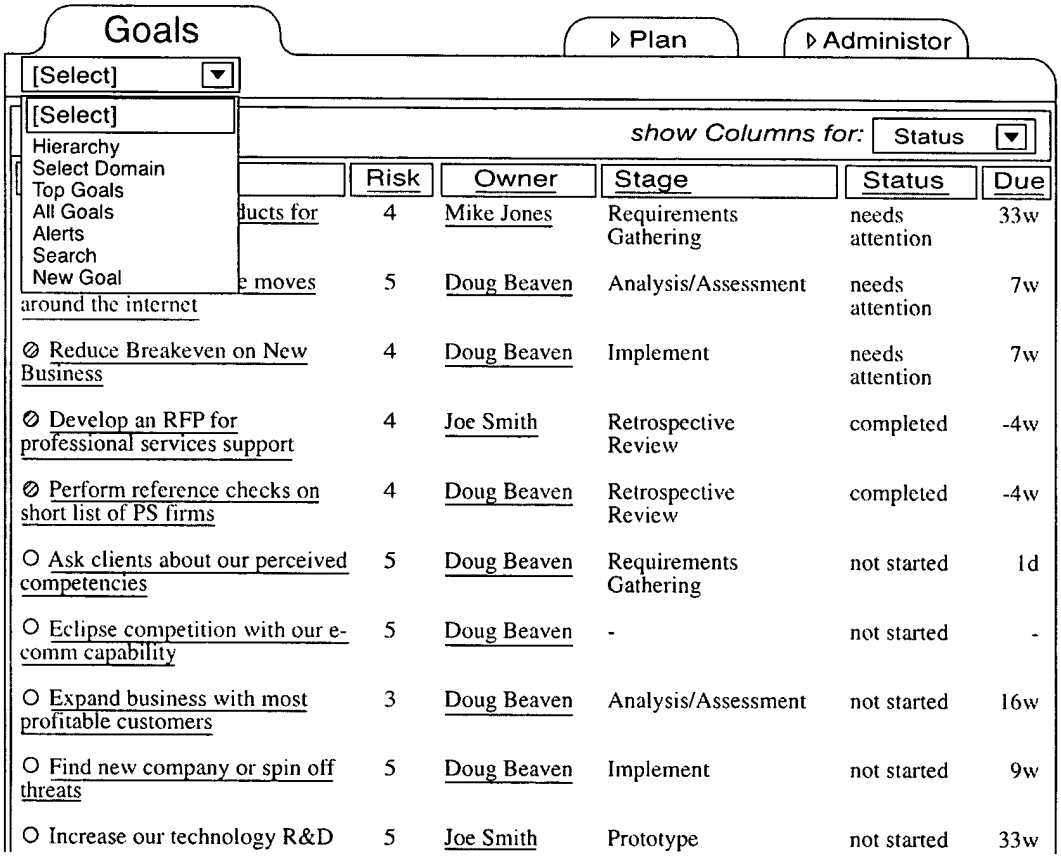

Goals
Plan
Administor
[Select]
[Select]
Hierarchy
Select Domain
Top Goals
All Goals
Alerts
Search
New Goal
show Columns for:
Status
Risk
Owner
Stage
Status
Due
ducts for
4
Mike Jones
Requirements Gathering
needs attention
33w
e moves around the internet
5
Doug Beaven
Analysis/Assessment
needs attention
7w
Reduce Breakeven on New Business
4
Doug Beaven
Implement
needs attention
7w
Develop an RFP for professional services support
4
Joe Smith
Retrospective Review
completed
-4w
Perform reference checks on short list of PS firms
4
Doug Beaven
Retrospective Review
completed
-4w
Ask clients about our perceived competencies
5
Doug Beaven
Requirements Gathering
not started
1d
Eclipse competition with our e-comm capability
5
Doug Beaven
-
not started
-
Expand business with most profitable customers
3
Doug Beaven
Analysis/Assessment
not started
16w
Find new company or spin off threats
5
Doug Beaven
Implement
not started
9w
Increase our technology R&D
5
Joe Smith
Prototype
not started
33w

Fig. 21

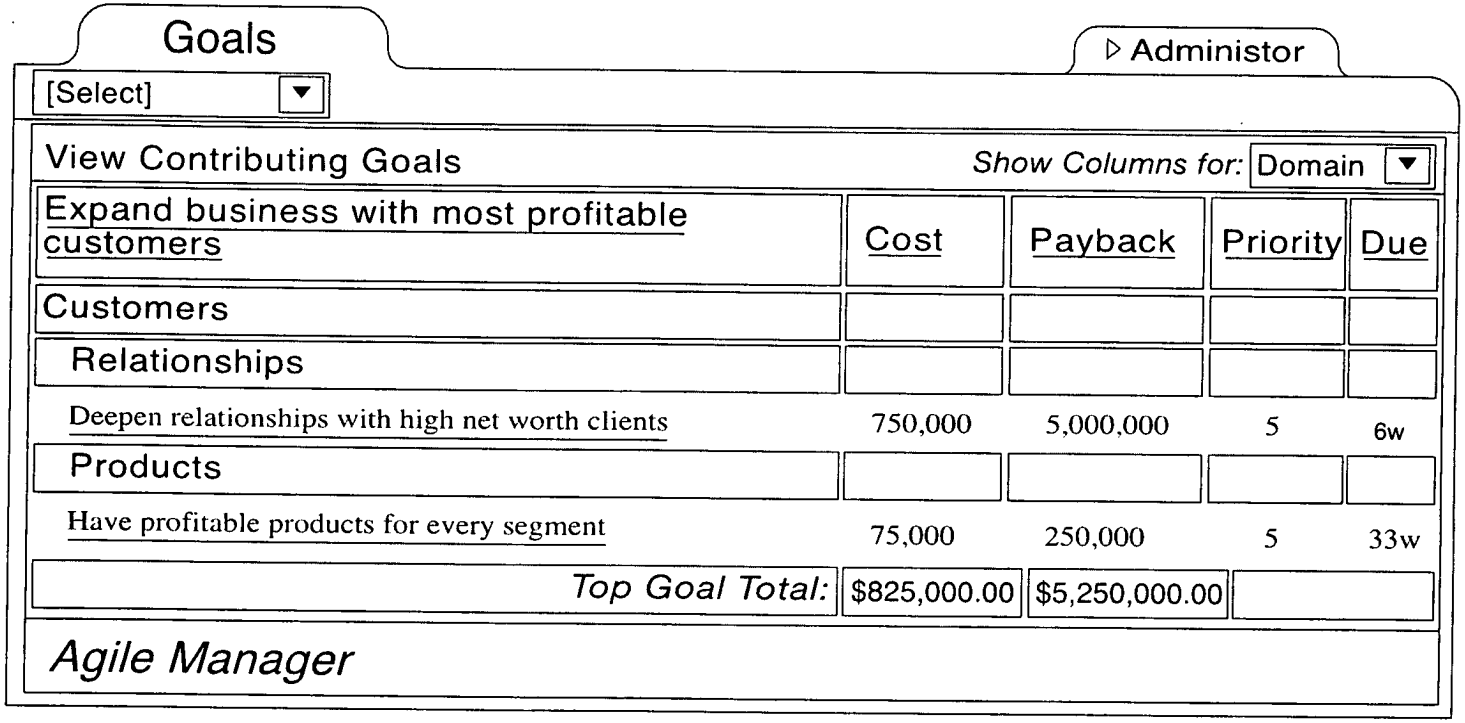

Goals
Administor
[Select]
View Contributing Goals
Show Columns for: Domain
Expand business with most profitable customers
Cost
Payback
Priority
Due
Customers
Relationships
Deepen relationships with high net worth clients
750,000
5,000,000
5
6w
Products
Have profitable products for every segment
75,000
250,000
5
33w
Top Goal Total:
$825,000.00
$5,250,000.00
Agile Manager

Fig. 22

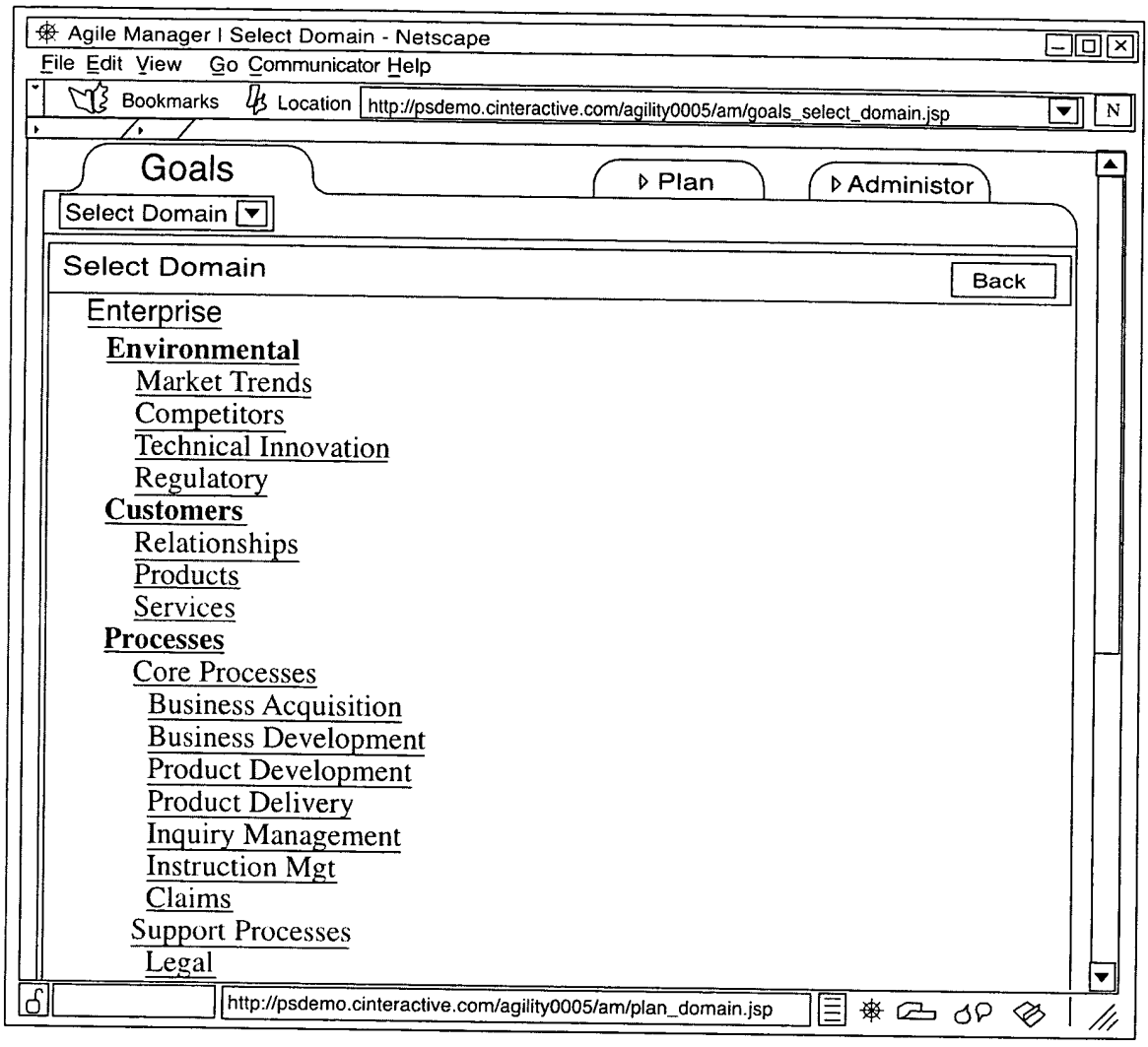

Agile Manager I Select Domain - Netscape
File Edit View Go Communicator Help
Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_select_domain.jsp
Goals
Plan
Administor
Select Domain
Select Domain
Back
Enterprise
Environmental
Market Trends
Competitors
Technical Innovation
Regulatory
Customers
Relationships
Products
Services
Processes
Core Processes
Business Acquisition
Business Development
Product Development
Product Delivery
Inquiry Management
Instruction Mgt
Claims
Support Processes
Legal
http://psdemo.cinteractive.com/agility0005/am/plan_domain.jsp

Fig. 23

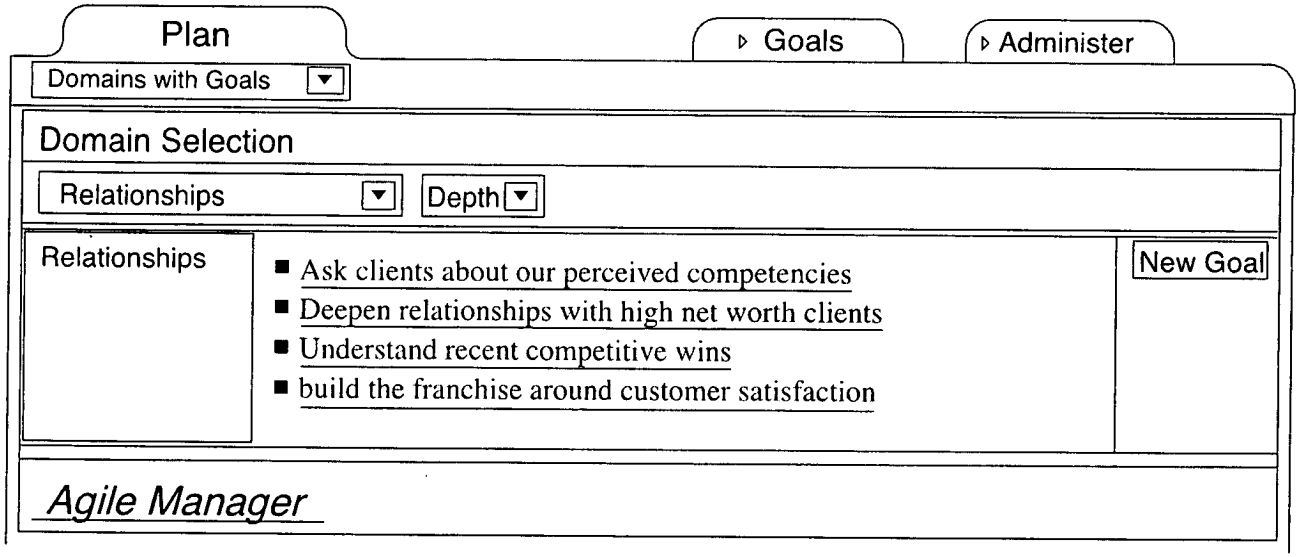

Plan
Goals
Administer
Domains with Goals
Domain Selection
Relationships
Depth
Relationships
Ask clients about our perceived competencies
Deepen relationships with high net worth clients
Understand recent competitive wins
build the franchise around customer satisfaction
New Goal
Agile Manager

Fig. 24

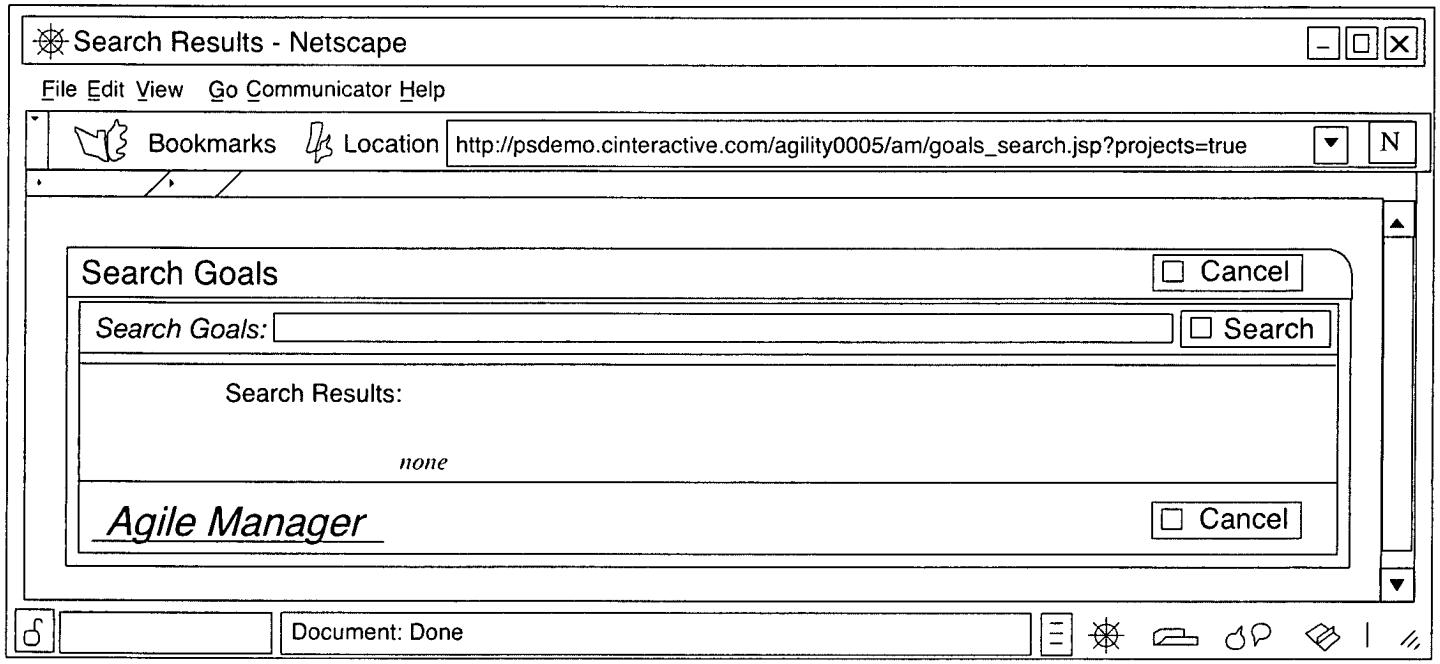

Search Results - Netscape
File Edit View Go Communicator Help
Bookmarks
Location
http://psdemo.cinteractive.com/agility0005/am/goals_search.jsp?projects=true
N
Search Goals
Cancel
Search Goals:
Search
Search Results:
none
Agile Manager
Cancel
Document: Done

Fig. 25

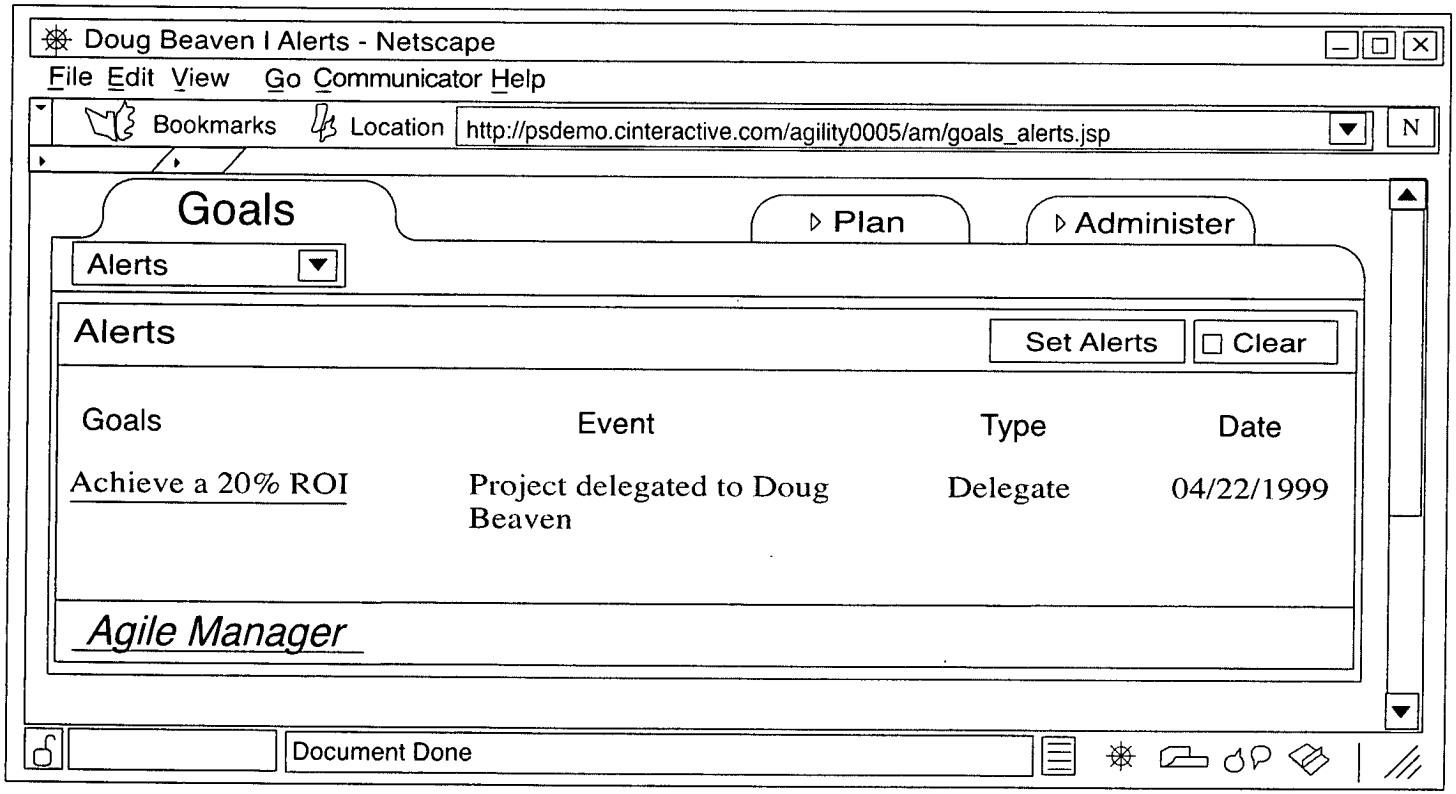

Doug Beaven I Alerts - Netscape
File Edit View Go Communicator Help
Bookmarks
Location
http://psdemo.cinteractive.com/agility0005/am/goals_alerts.jsp
N
Goals
Plan
Administer
Alerts
Alerts
Set Alerts
Clear
Goals
Event
Type
Date
Achieve a 20% ROI
Project delegated to Doug Beaven
Delegate
04/22/1999
Agile Manager
Document Done

Fig. 26

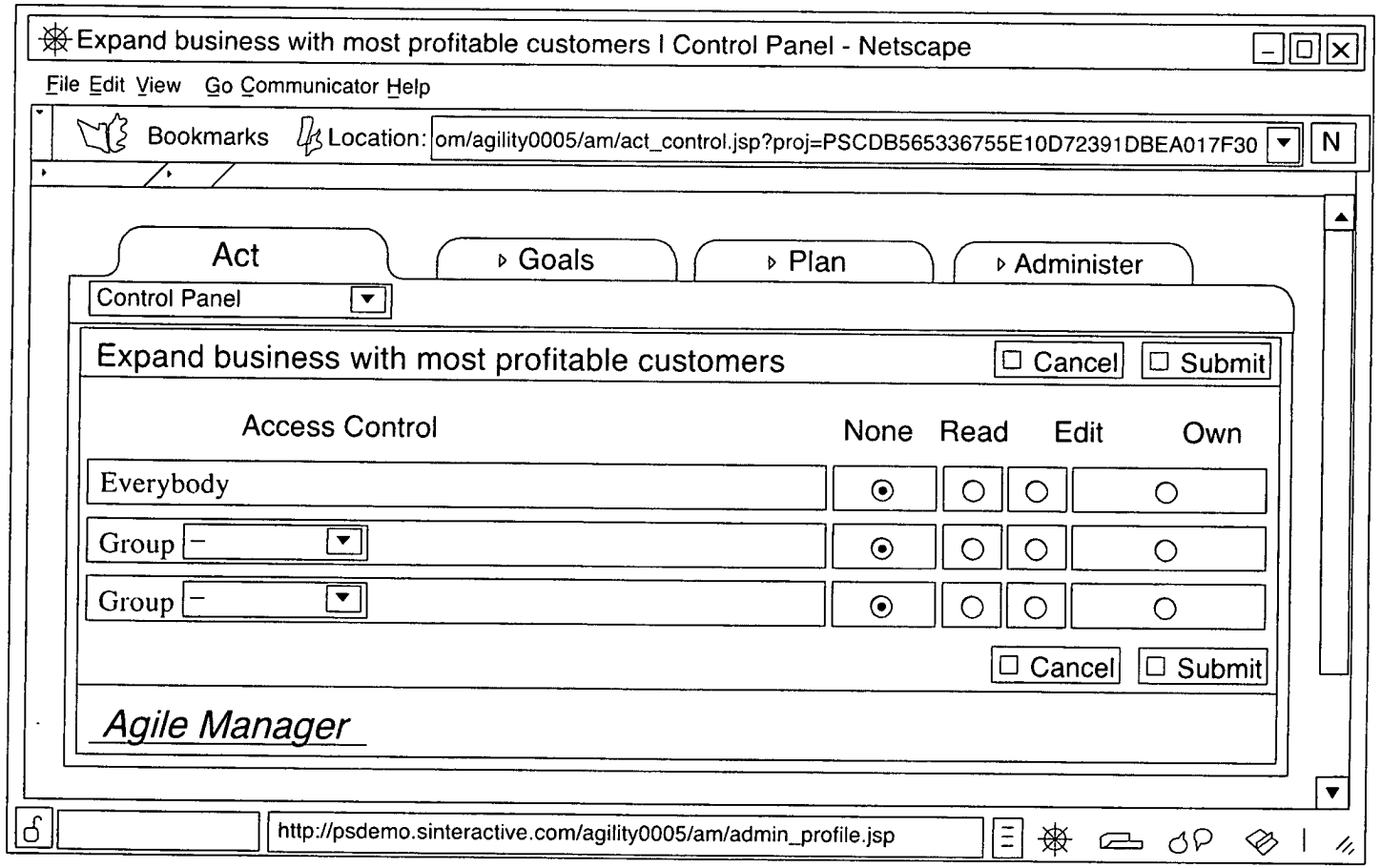

Expand business with most profitable customers I Control Panel - Netscape
File Edit View Go Communicator Help
Bookmarks
Location:
om/agility0005/am/act_control.jsp?proj=PSCDB565336755E10D72391DBEA017F30
N
Act
Goals
Plan
Administer
Control Panel
Expand business with most profitable customers
Cancel
Submit
Access Control
None
Read
Edit
Own
Everybody
Group
Group
Cancel
Submit
Agile Manager
http://psdemo.sinteractive.com/agility0005/am/admin_profile.jsp

Fig. 27

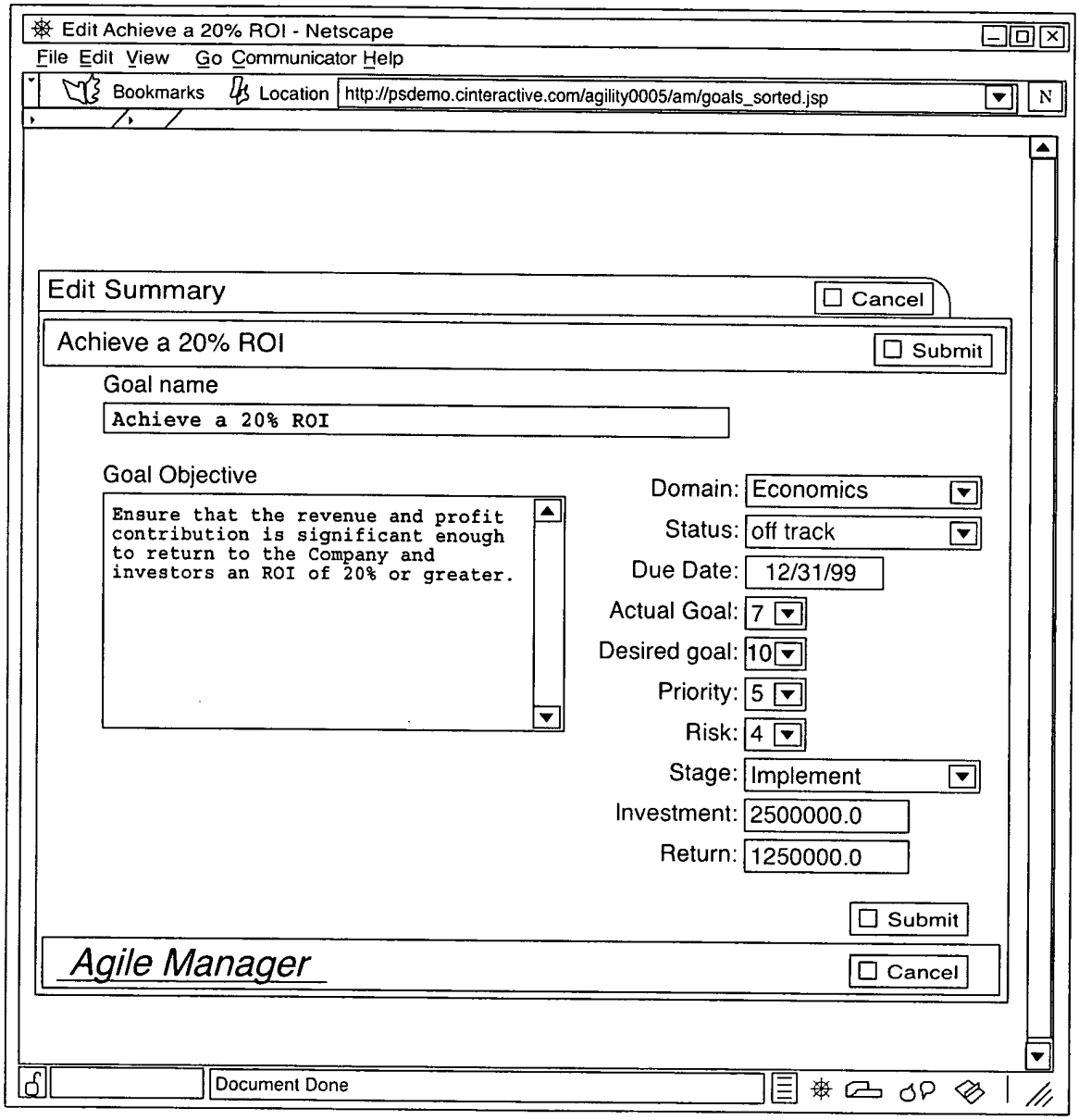

Edit Achieve a 20% ROI - Netscape
File Edit View Go Communicator Help
Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp
Edit Summary
Cancel
Achieve a 20% ROI
Submit
Goal name
Achieve a 20% ROI
Goal Objective
Ensure that the revenue and profit contribution is significant enough to return to the Company and investors an ROI of 20% or greater.
Domain: Economics
Status: off track
Due Date: 12/31/99
Actual Goal: 7
Desired goal: 10
Priority: 5
Risk: 4
Stage: Implement
Investment: 2500000.0
Return: 1250000.0
Submit
Agile Manager
Cancel
Document Done

Fig. 28

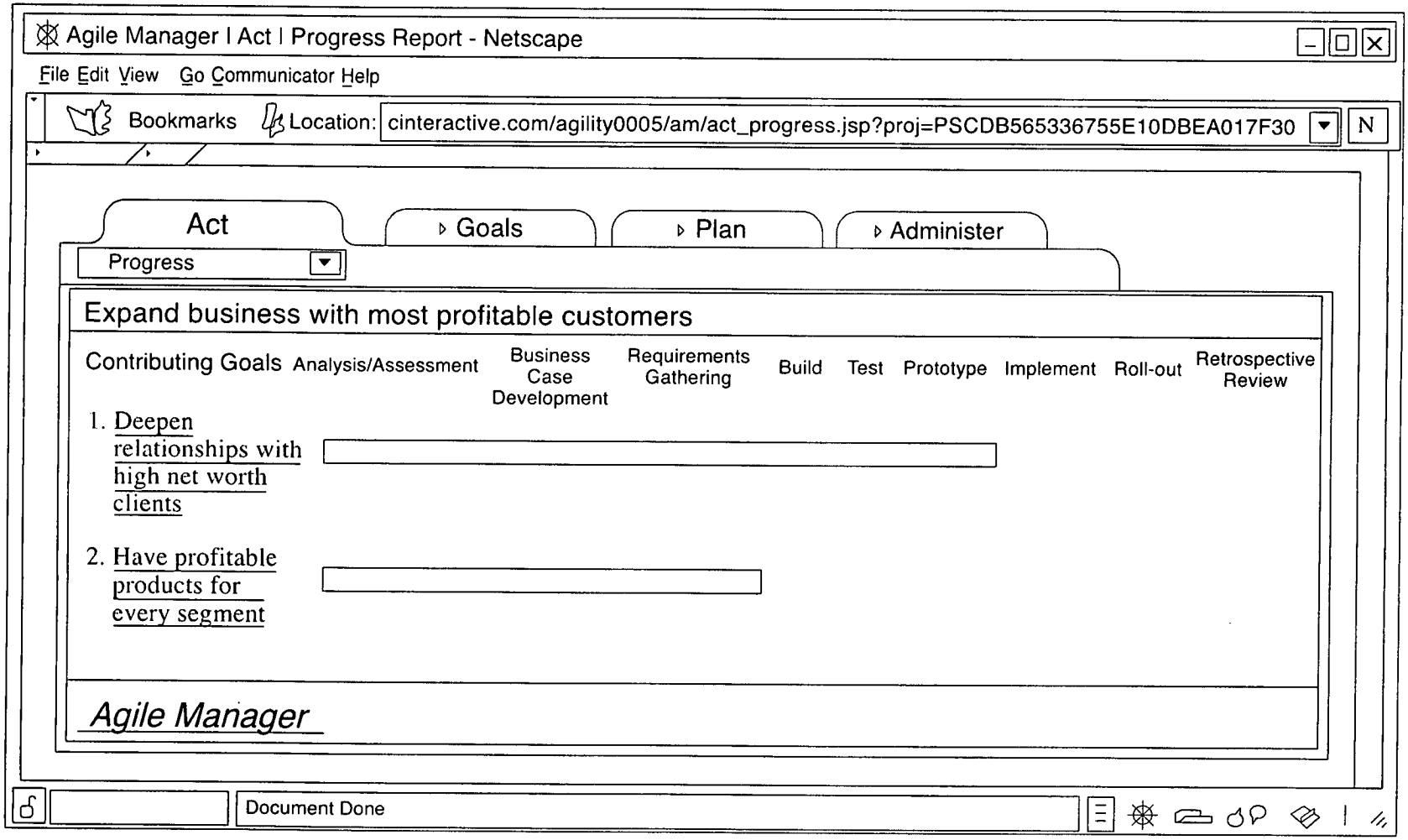

Agile Manager I Act I Progress Report - Netscape
File Edit View Go Communicator Help
Bookmarks Location: cinteractive.com/agility0005/am/act_progress.jsp?proj=PSCDB565336755E10DBEA017F30
N
Act
Goals
Plan
Administer
Progress
Expand business with most profitable customers
Contributing Goals
Analysis/Assessment
Business Case Development
Requirements Gathering
Build
Test
Prototype
Implement
Roll-out
Retrospective Review
1. Deepen relationships with high net worth clients
2. Have profitable products for every segment
Agile Manager
Document Done

Fig. 29

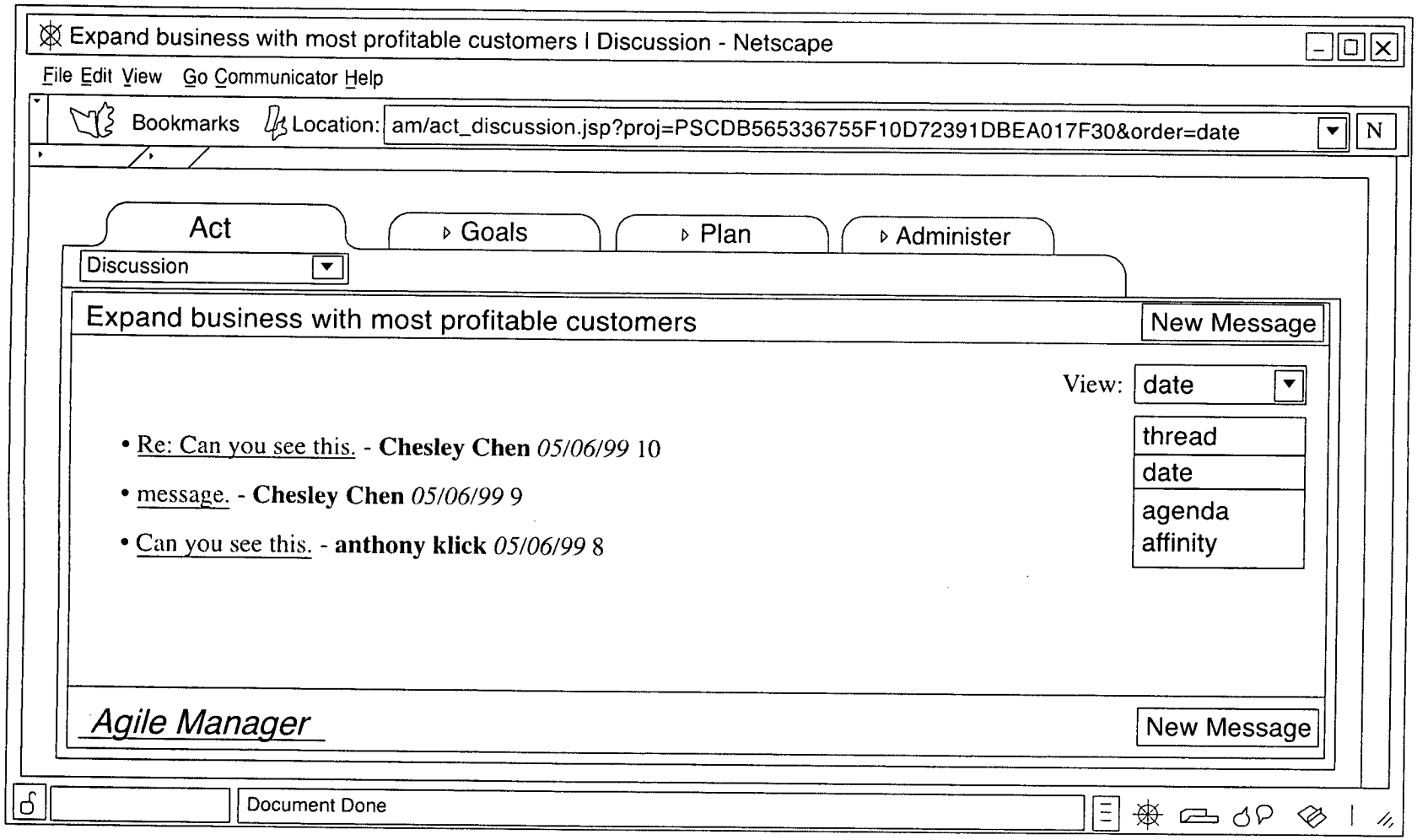

Expand business with most profitable customers | Discussion - Netscape
File Edit View Go Communicator Help
Bookmarks Location: am/act_discussion.jsp?proj=PSCDB565336755F10D72391DBEA017F30&order=date
N
Act
Goals
Plan
Administer
Discussion
Expand business with most profitable customers
New Message
View: date
thread
date
agenda
affinity
• Re: Can you see this. - Chesley Chen 05/06/99 10
• message. - Chesley Chen 05/06/99 9
• Can you see this. - anthony klick 05/06/99 8
Agile Manager
New Message
Document Done

Fig. 30

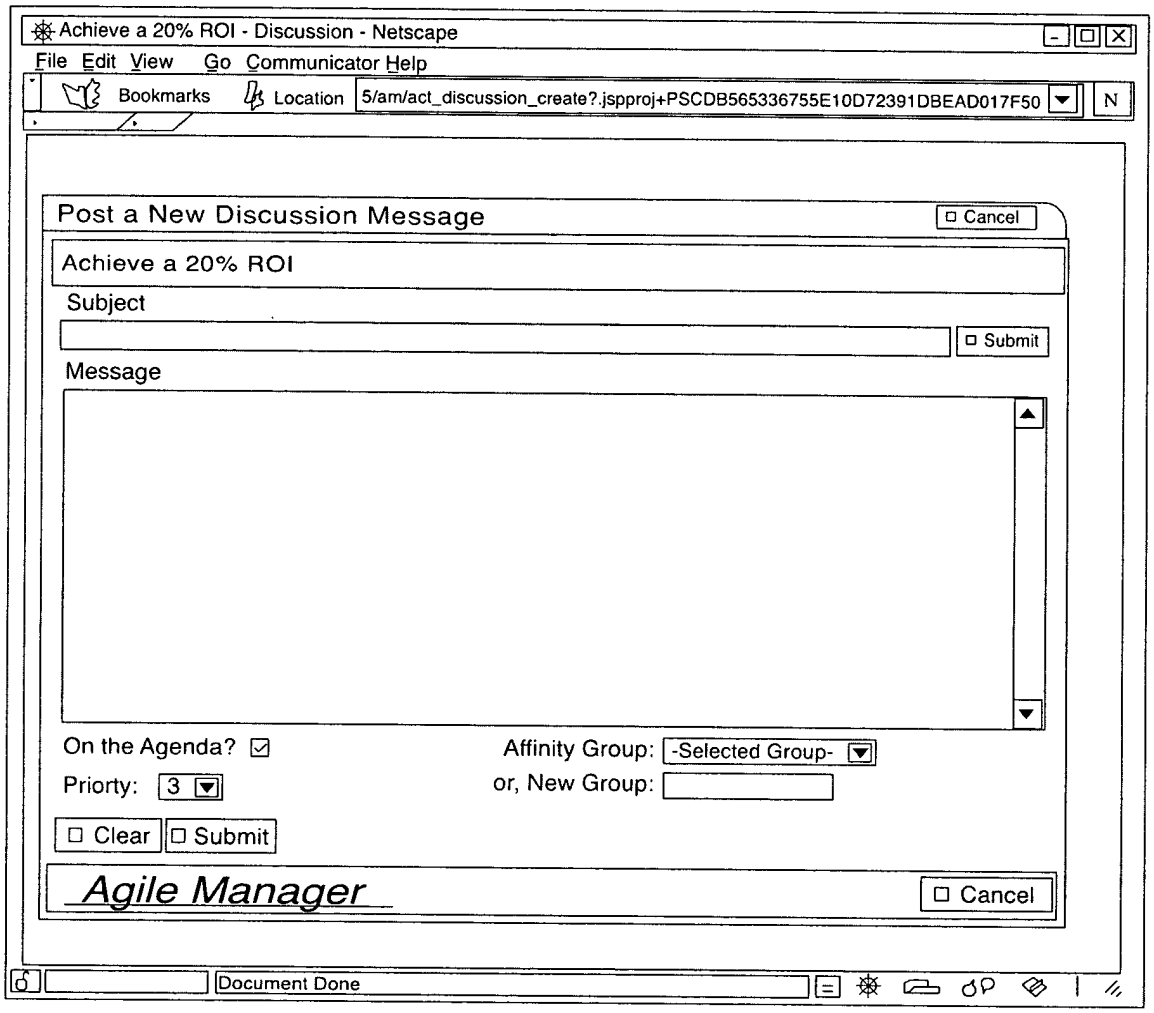

Achieve a 20% ROI - Discussion - Netscape
File Edit View Go Communicator Help
Bookmarks Location 5/am/act_discussion_create?.jspproj+PSCDB565336755E10D72391DBEAD017F50
N
Post a New Discussion Message
Cancel
Achieve a 20% ROI
Subject
Submit
Message
On the Agenda?
Affinity Group: -Selected Group-
Priorty: 3
or, New Group:
Clear
Submit
Agile Manager
Cancel
Document Done

Fig. 31

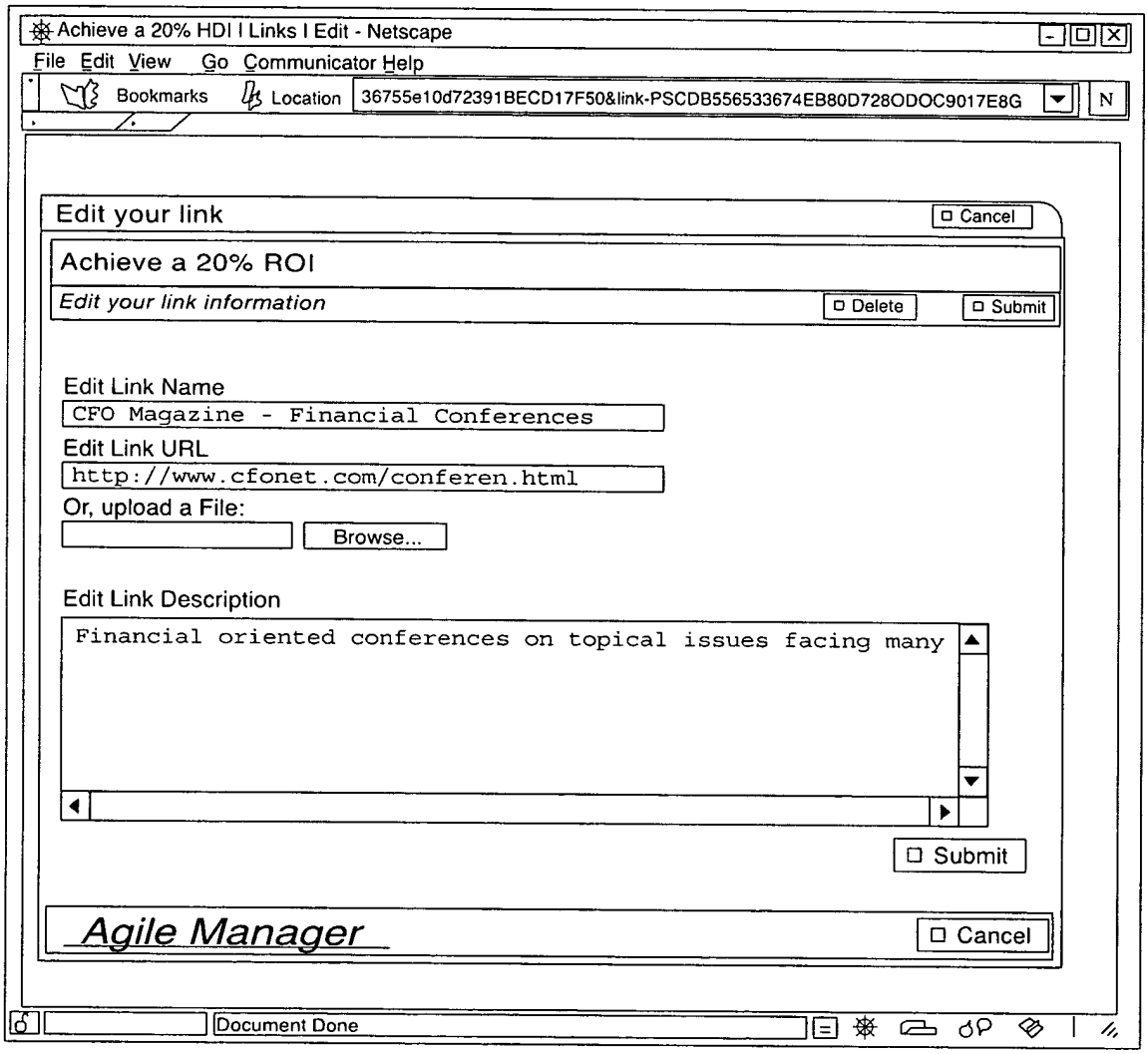

Achieve a 20% HDI I Links I Edit - Netscape
File Edit View Go Communicator Help
Bookmarks Location 36755e10d72391BECD17F50&link-PSCDB556533674EB80D728ODOC9017E8G
N
Edit your link
Cancel
Achieve a 20% ROI
Edit your link information
Delete
Submit
Edit Link Name
CFO Magazine - Financial Conferences
Edit Link URL
http://www.cfonet.com/conferen.html
Or, upload a File:
Browse...
Edit Link Description
Financial oriented conferences on topical issues facing many
Submit
Agile Manager
Cancel
Document Done

Fig. 32

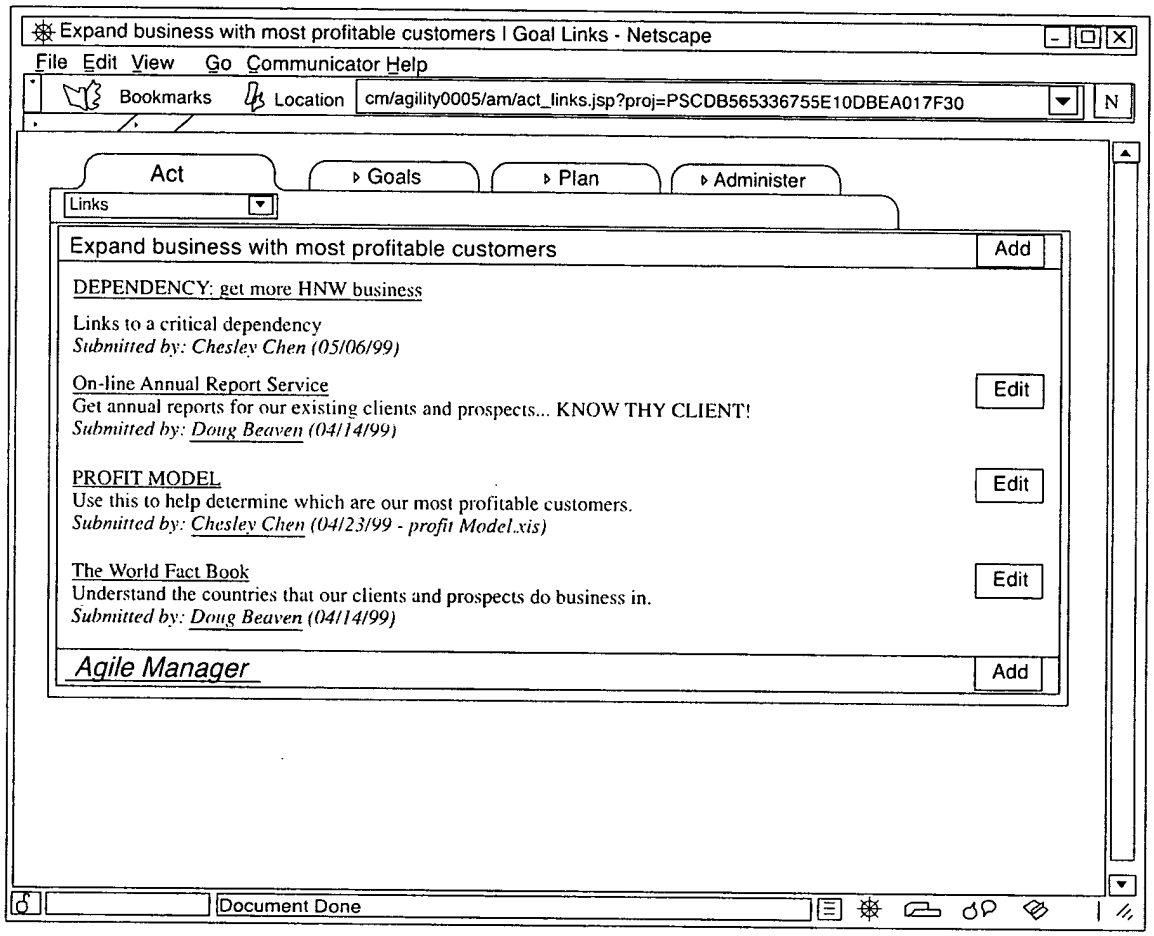

Expand business with most profitable customers | Goal Links - Netscape
File Edit View Go Communicator Help
Bookmarks Location cm/agility0005/am/act_links.jsp?proj=PSCDB565336755E10DBEA017F30
N
Act
Goals
Plan
Administer
Links
Expand business with most profitable customers
Add
DEPENDENCY: get more HNW business
Links to a critical dependency
Submitted by: Chesley Chen (05/06/99)
On-line Annual Report Service
Get annual reports for our existing clients and prospects... KNOW THY CLIENT!
Submitted by: Doug Beaven (04/14/99)
Edit
PROFIT MODEL
Use this to help determine which are our most profitable customers.
Submitted by: Chesley Chen (04/23/99 - profit Model.xls)
Edit
The World Fact Book
Understand the countries that our clients and prospects do business in.
Submitted by: Doug Beaven (04/14/99)
Edit
Agile Manager
Add
Document Done

Fig. 33

Agility MANAGEMENT PARTNERS

EMPLOYEES ARE TREATED LIKE OWNERS

EMPLOYEES ARE TREATED LIKE AND COMPENSATED IN A MANNER REFLECTIVE OF OWNERSHIP RATHER THAN SERVITUDE.

"Employees [must] trust the company and believe changes are in their best interests." - Donald K. Clifford and Richard E. Cavanagh, *The Winning Performance*

High Performance Traits
Relish change
Fight inertia
Clear strategy
Customer driven
Act like owners
Treated like owners
Reward risk taking
Fact based decisions
Value based decisions
Effective systems
Open to new ideas
Adapt
Process changes
Constant improvement
Fluid boundaries
Teamwork
Anti-bureaucracy
Know business drivers
Make alliances
Focused clearly
Industry trends & challenges
Basic Information Feedback

	Strongly Disagree	Disagree	Slightly Disagree	Neutral	Slightly Agree	Agree	Strongly Agree	No Response
1. Managers in this company respect the rights of employees and treat them with dignity and respect.	o	o	o	o	o	o	o	o
2. Job objectives are aligned with the overall corporate vision.	o	o	o	o	o	o	o	o
3. Performance information is shared with employees so they stay focused on results.	o	o	o	o	o	o	o	o
4. Compensation and reward structures are aligned with company and/or unit performace.	o	o	o	o	o	o	o	o

Fig. 34

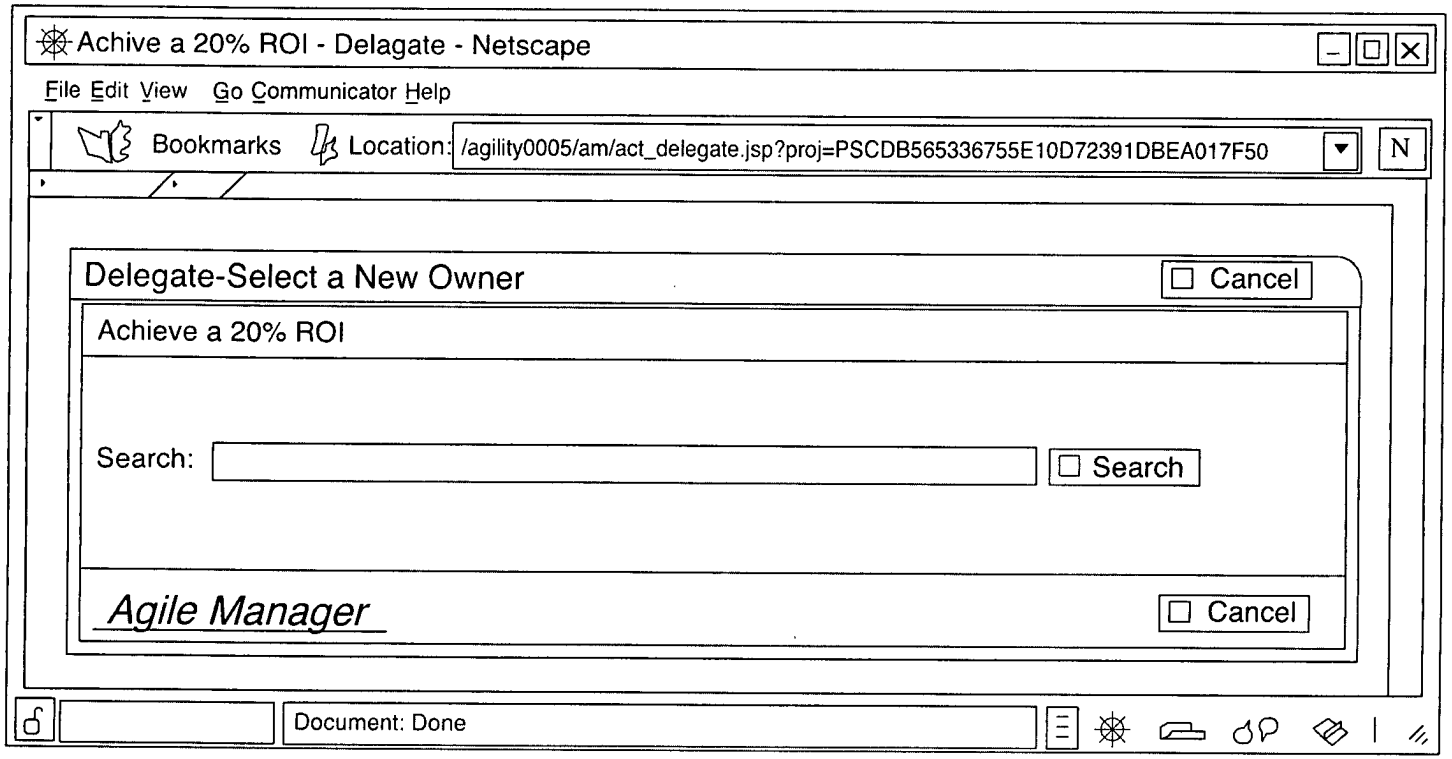

Achive a 20% ROI - Delagate - Netscape
File Edit View Go Communicator Help
Bookmarks
Location:
/agility0005/am/act_delegate.jsp?proj=PSCDB565336755E10D72391DBEA017F50
N
Delegate-Select a New Owner
Cancel
Achieve a 20% ROI
Search:
Search
Agile Manager
Cancel
Document: Done

Fig. 34A

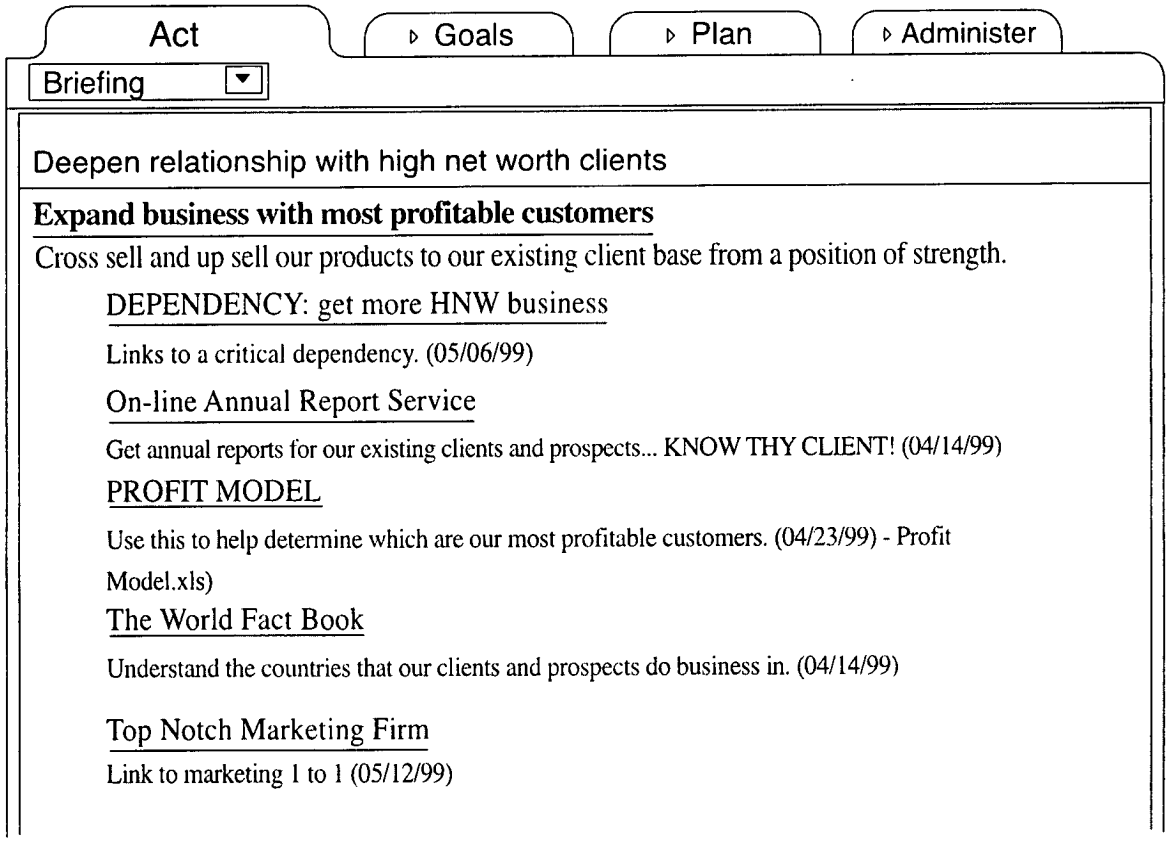

Act
Goals
Plan
Administer
Briefing
Deepen relationship with high net worth clients
Expand business with most profitable customers
Cross sell and up sell our products to our existing client base from a position of strength.
DEPENDENCY: get more HNW business
Links to a critical dependency. (05/06/99)
On-line Annual Report Service
Get annual reports for our existing clients and prospects... KNOW THY CLIENT! (04/14/99)
PROFIT MODEL
Use this to help determine which are our most profitable customers. (04/23/99) - Profit Model.xls)
The World Fact Book
Understand the countries that our clients and prospects do business in. (04/14/99)
Top Notch Marketing Firm
Link to marketing 1 to 1 (05/12/99)

Fig. 35

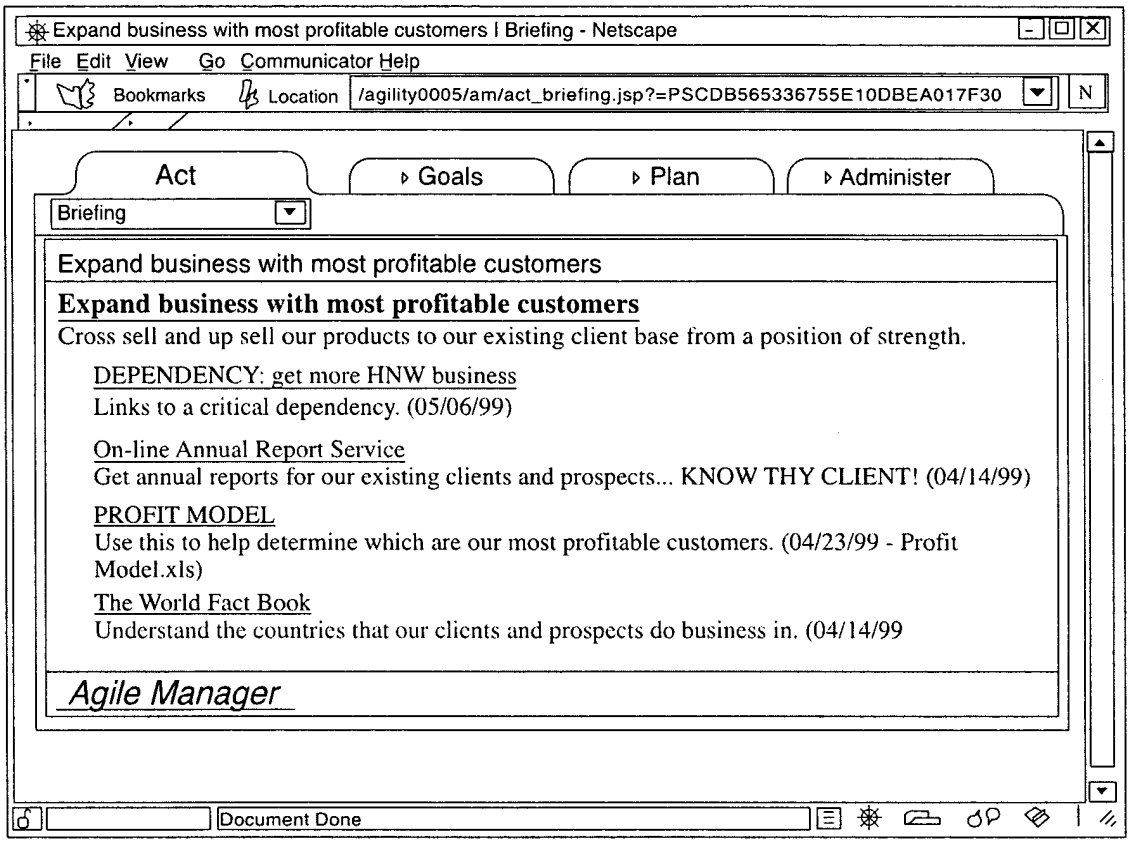

Expand business with most profitable customers | Briefing - Netscape
File Edit View Go Communicator Help
Bookmarks Location /agility0005/am/act_briefing.jsp?=PSCDB565336755E10DBEA017F30
N
Act
Goals
Plan
Administer
Briefing
Expand business with most profitable customers
Expand business with most profitable customers
Cross sell and up sell our products to our existing client base from a position of strength.
DEPENDENCY: get more HNW business
Links to a critical dependency. (05/06/99)
On-line Annual Report Service
Get annual reports for our existing clients and prospects... KNOW THY CLIENT! (04/14/99)
PROFIT MODEL
Use this to help determine which are our most profitable customers. (04/23/99 - Profit Model.xls)
The World Fact Book
Understand the countries that our clients and prospects do business in. (04/14/99
Agile Manager
Document Done

Fig. 36

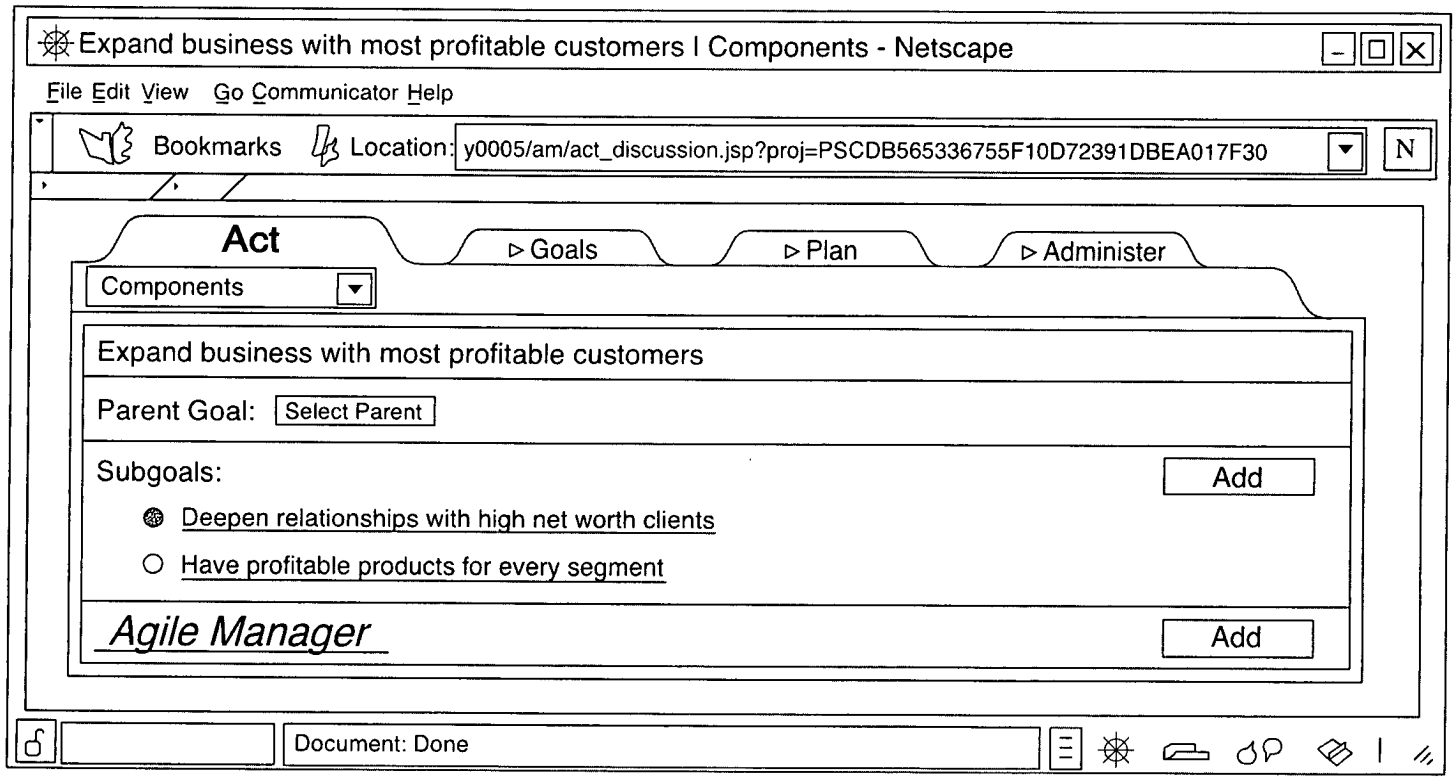

Expand business with most profitable customers I Components - Netscape
File Edit View Go Communicator Help
Bookmarks
Location:
y0005/am/act_discussion.jsp?proj=PSCDB565336755F10D72391DBEA017F30
N
Act
▷ Goals
▷ Plan
▷ Administer
Components
Expand business with most profitable customers
Parent Goal:
Select Parent
Subgoals:
Add
Deepen relationships with high net worth clients
Have profitable products for every segment
Agile Manager
Add
Document: Done

Fig. 37

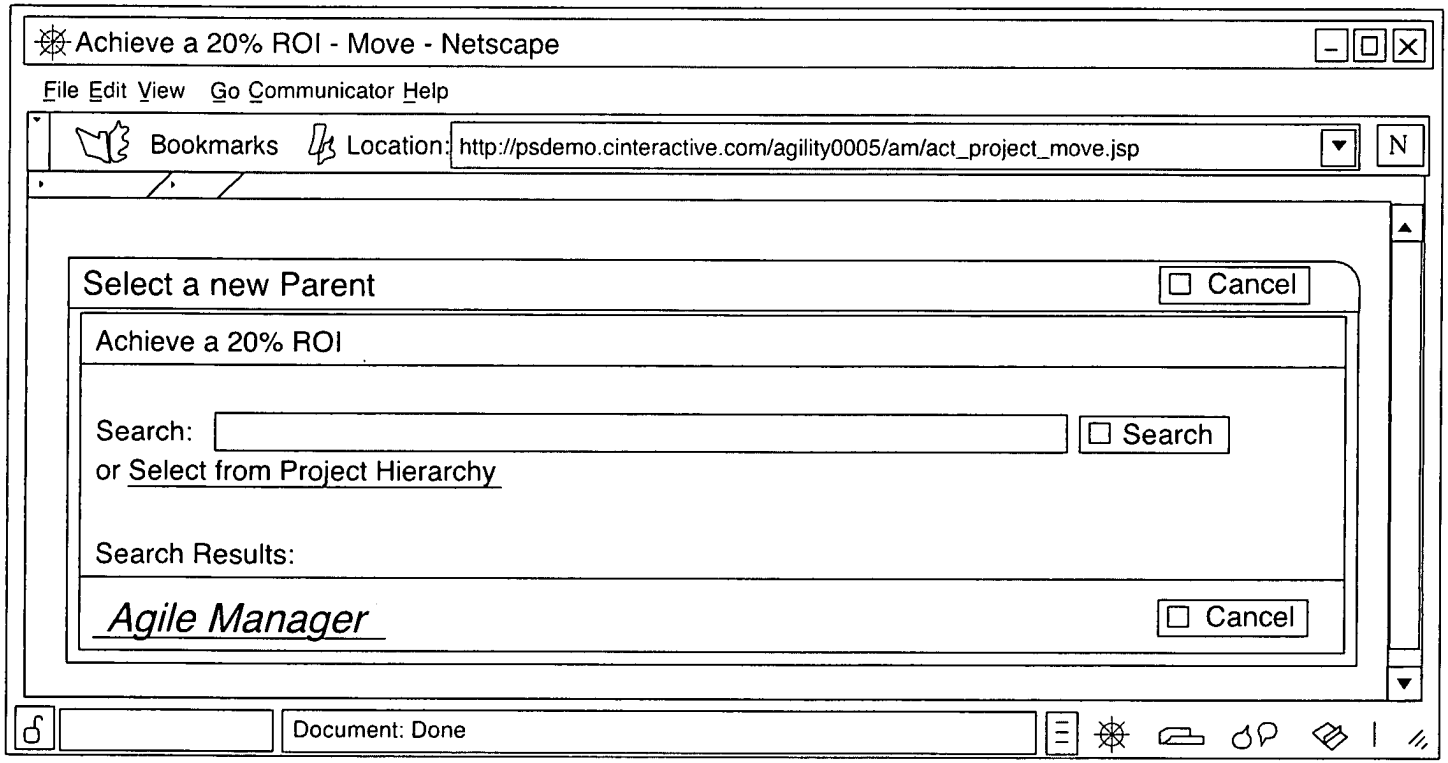

Achieve a 20% ROI - Move - Netscape
File Edit View Go Communicator Help
Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/act_project_move.jsp
N
Select a new Parent
Cancel
Achieve a 20% ROI
Search:
Search
or Select from Project Hierarchy
Search Results:
Agile Manager
Cancel
Document: Done

Fig. 38

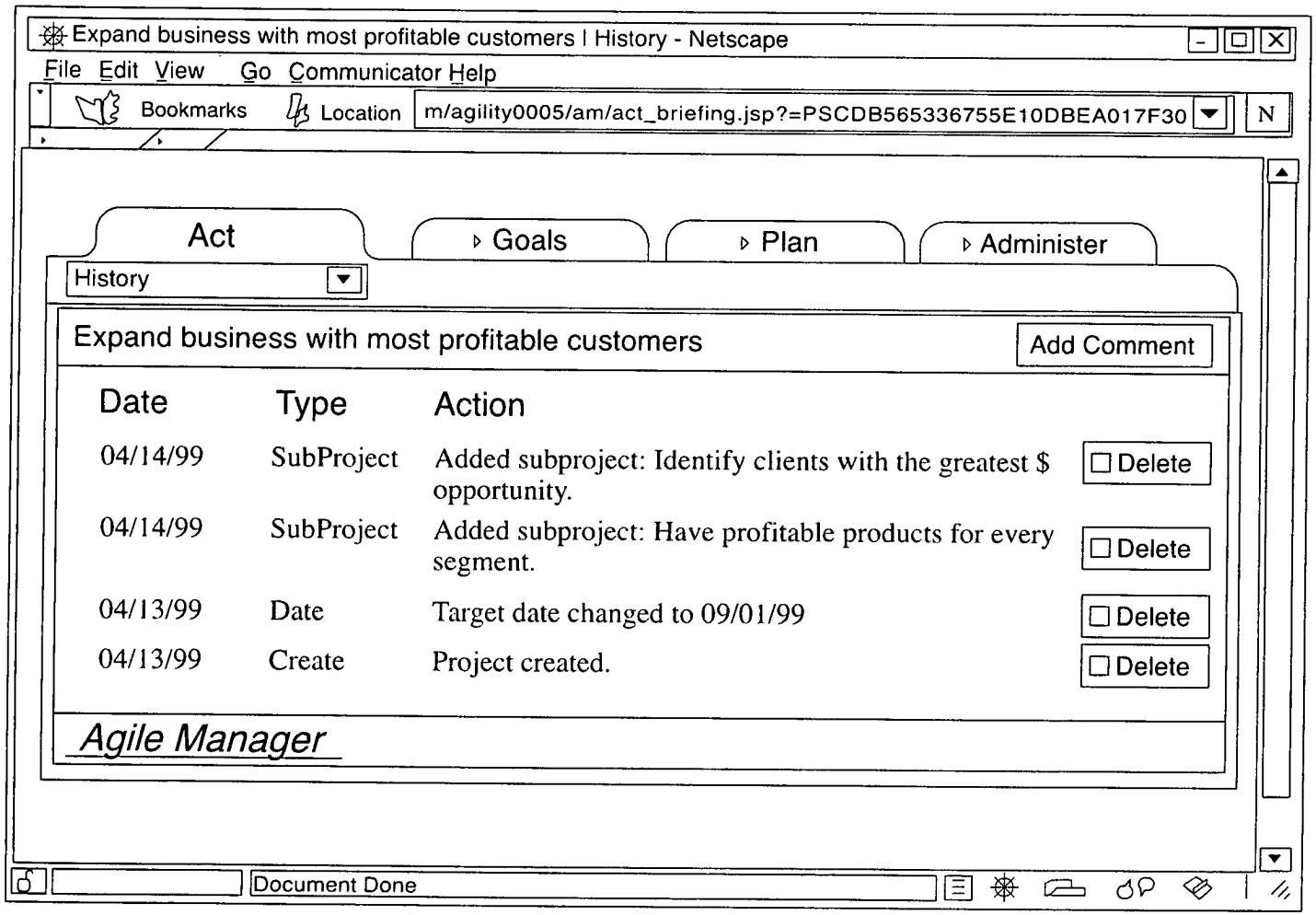
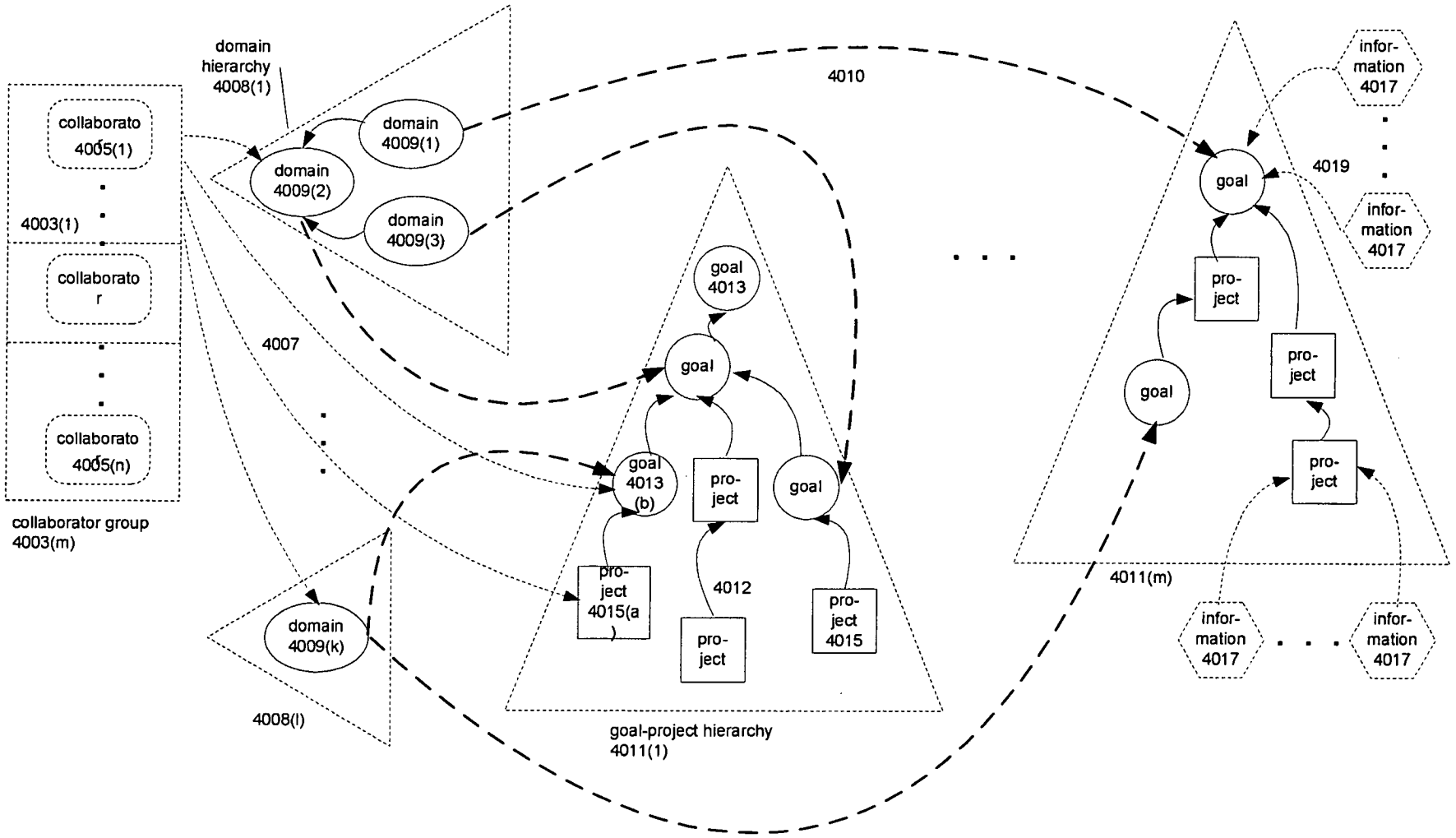

Expand business with most profitable customers | History - Netscape
File Edit View Go Communicator Help
Bookmarks Location m/agility0005/am/act_briefing.jsp?=PSCDB565336755E10DBEA017F30
N
Act
Goals
Plan
Administer
History
Expand business with most profitable customers
Add Comment
Date
Type
Action
04/14/99
SubProject
Added subproject: Identify clients with the greatest $ opportunity.
Delete
04/14/99
SubProject
Added subproject: Have profitable products for every segment.
Delete
04/13/99
Date
Target date changed to 09/01/99
Delete
04/13/99
Create
Project created.
Delete
Agile Manager
Document Done

Fig. 39



a model in parent 4001

Fig. 40

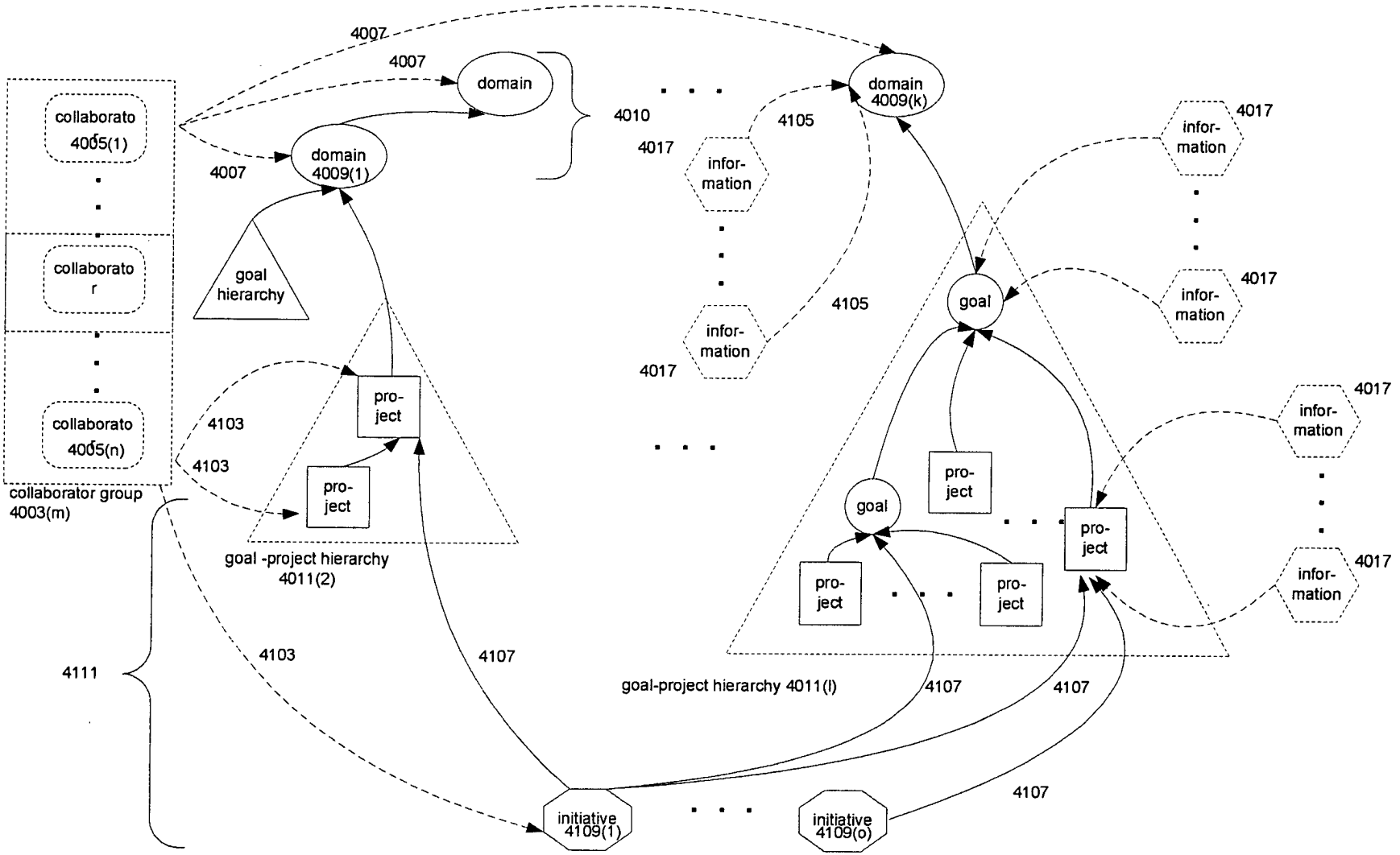

4007
4007
domain
4010
domain 4009(k)
collaborato 4005(1)
domain 4009(1)
4007
4017
infor-mation
4105
4017
infor-mation
collaborato r
goal hierarchy
4105
goal
4017
infor-mation
4017
infor-mation
4017
pro-ject
4103
4103
pro-ject
collaborato 4005(n)
collaborator group 4003(m)
goal -project hierarchy 4011(2)
goal
pro-ject
pro-ject
pro-ject
pro-ject
4017
infor-mation
4017
infor-mation
4111
4103
4107
goal-project hierarchy 4011(l)
4107
4107
4107
initiative 4109(1)
initiative 4109(o)
improved model 4101

Fig. 41

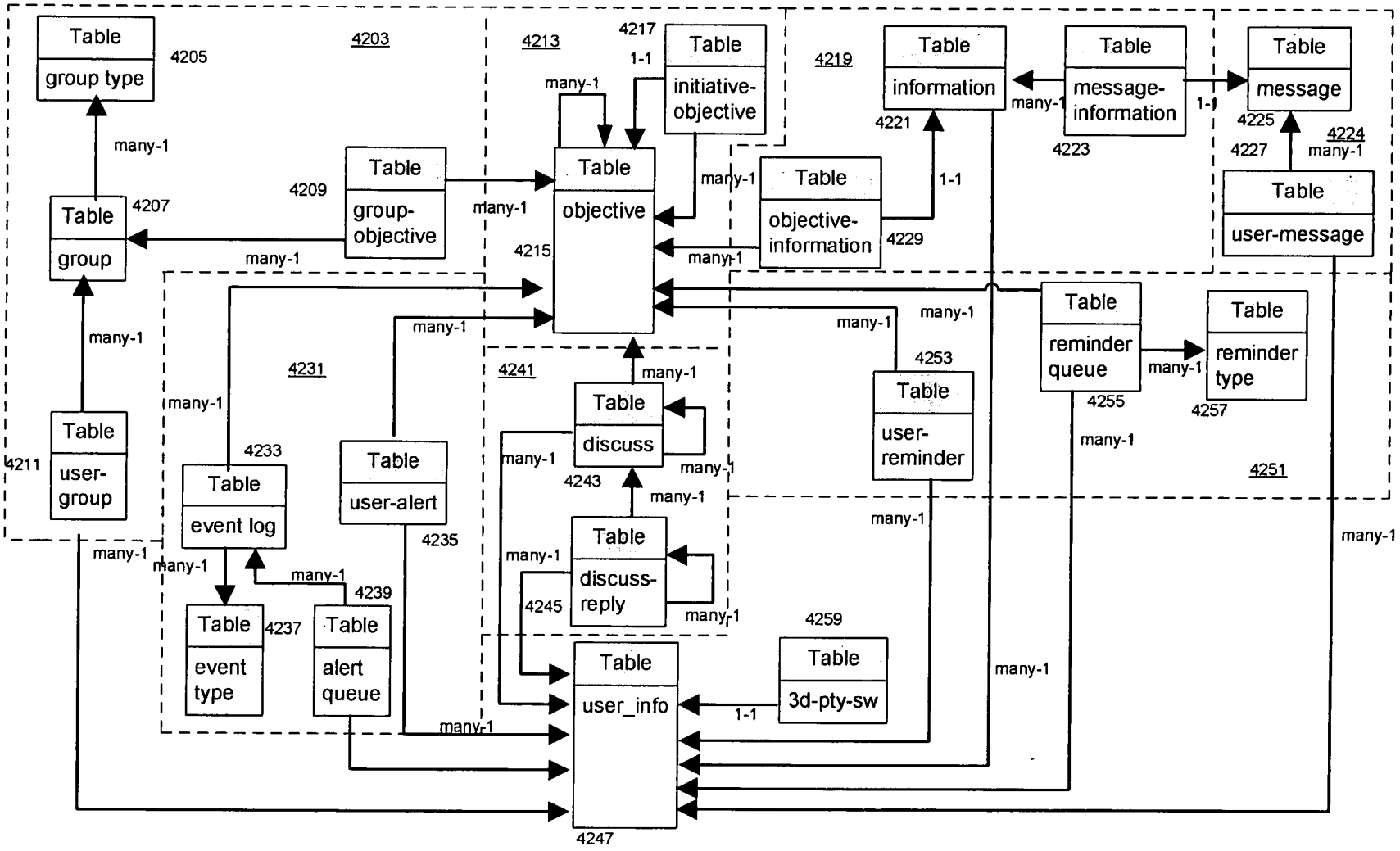


Table
group type
4205
4203
4213
4217
1-1
Table
initiative-objective
4219
Table
information
Table
message-information
Table
message
4225
4224
many-1
4227
4221
4223
many-1
1-1
many-1
Table
group
4207
4209
Table
group-objective
many-1
Table
objective
4215
many-1
Table
objective-information
4229
1-1
Table
user-message
many-1
many-1
many-1
many-1
4231
4241
many-1
Table
discuss
4243
many-1
many-1
many-1
4253
Table
user-reminder
Table
reminder queue
4255
many-1
Table
reminder type
4257
many-1
4251
many-1
Table
user-group
4211
many-1
many-1
Table
event log
4233
Table
user-alert
4235
many-1
many-1
many-1
Table
discuss-reply
4245
many-1
many-1
4239
Table
event type
4237
Table
alert queue
4259
Table
user_info
Table
3d-pty-sw
1-1
many-1
many-1
4247
4201

Fig. 42

```
CREATE TABLE T_GROUP (
4303  GROUP_ID          NUMBER (8)
DEFAULT 0 NOT NULL,
4305  GROUP_NAME        VARCHAR2 (30),
4307  GROUP_TYPE_KEY    NUMBER (8),
      CREATED_DATE      DATE
DEFAULT SYSDATE,
      UPDATED_DATE      DATE,
      DESCRIPTION       VARCHAR2 (255),
      GROUP_CATEGORY    VARCHAR2 (10),
      FILTER_USER       VARCHAR2 (20)
DEFAULT USER NOT NULL,
      CONSTRAINT GROUP_UK1
        UNIQUE (GROUP_NAME),
      CONSTRAINT GROUP_PK
    PRIMARY KEY ( GROUP_ID ) );
```

4207

```
CREATE TABLE T_GROUP_TYPE (
4311  GROUP_TYPE_KEY   NUMBER (8)     NOT NULL,
4313  GROUP_TYPE       VARCHAR2 (32),
4315  SECURITY_LEVEL   NUMBER (2),
      CREATED_DATE     DATE           DEFAULT SYSDATE,
      UPDATED_DATE     DATE,
      CONSTRAINT GROUP_TYPE_PK
    PRIMARY KEY ( GROUP_TYPE_KEY ) );
```

4205

```
CREATE TABLE T_GROUP_OBJECTIVE (
4317  GROUP_ID         NUMBER (8)     NOT NULL,
4319  OBJECTIVE_ID     NUMBER (8)     NOT NULL,
      CREATED_DATE     DATE           DEFAULT SYSDATE,
      UPDATED_DATE     DATE,
4321  PERMISSION       NUMBER (2)     DEFAULT 0,
      FILTER_USER      VARCHAR2 (20)  DEFAULT USER NOT NULL,
      CONSTRAINT GROUP_OBJECTIVE_PK
    PRIMARY KEY ( GROUP_ID, OBJECTIVE_ID ) );
```

4209

Fig. 43

```
CREATE TABLE T_OBJECTIVE (
4401 OBJECTIVE_ID          NUMBER (8)     DEFAULT 0 NOT NULL,
4403 OBJECTIVE_NAME        VARCHAR2 (50)   NOT NULL,
4405 OBJECTIVE_TYPE_CODE   CHAR (1)       NOT NULL,
4407 OBJECTIVE_DESC        VARCHAR2 (1000),
4409 OWNER_USER_ID         NUMBER (8)     NOT NULL,
     DELEGATEE_USER_ID     NUMBER (8),
4411 PARENT_ID             NUMBER (8),
     KEY_BENEFIT           VARCHAR2 (1000),
     RISK_CODE             VARCHAR2 (3),
     PRIORITY_CODE         VARCHAR2 (3),
     PERCENT_COMPLETE      NUMBER (3),
     MAX_DURATION_DAYS     NUMBER (6),
     EST_DURATION_DAYS     NUMBER (6),
     MIN_DURATION_DAYS     NUMBER (6),
     ACT_FINISH_DATE       DATE,
     EST_FINISH_DATE       DATE,
     START_DATE            DATE,
     DUE_DATE              DATE,
     STATUS_SCORE          NUMBER (6,2),
     STATUS_CODE           VARCHAR2 (3),
     LOCKER_USER_ID        NUMBER (8),
4413 LOCK_FLAG             NUMBER (1),
     DISPLAY_SEQUENCE      NUMBER (4),
     MEASUREMENT           VARCHAR2 (255),
     LEADER_USER_ID        NUMBER (8),
     CHAMPION_USER_ID      NUMBER (8),
     ACT_PAYBACK           NUMBER (12,2),
     EST_PAYBACK           NUMBER (12,2),
     ACT_COST              NUMBER (12,2),
     EST_COST              NUMBER (12,2),
     ARCHIVED_FLAG         NUMBER (1)     DEFAULT 0,
     DESIRED_OBJ_ACHIEVE   NUMBER (3),
     EST_OBJ_ACHIEVE       NUMBER (3),
     CREATED_DATE          DATE           DEFAULT SYSDATE,
     UPDATED_DATE          DATE,
     STAGE_CODE            CHAR (3),
     FILTER_USER           VARCHAR2 (20)  DEFAULT USER NOT NULL,
     DELETED_FLAG          NUMBER (1)     DEFAULT 0,
      CONSTRAINT OBJECTIVE_CK1
             CHECK (OBJECTIVE_TYPE_CODE IN ('D','I','A','R')) ,
     CONSTRAINT OBJECTIVE_UK1
       UNIQUE (OBJECTIVE_NAME, OBJECTIVE_TYPE_CODE),
     CONSTRAINT OBJECTIVE_PK
     PRIMARY KEY ( OBJECTIVE_ID ) ) ;

4415 CREATE UNIQUE INDEX OBJECTIVE_IDX1 ON
     T_OBJECTIVE(OBJECTIVE_ID, PARENT_ID)
     ;
```

4215

Fig. 44

```
CREATE TABLE T_INFORMATION (
4501 ID              NUMBER (12)    NOT NULL,
4503 NAME            VARCHAR2 (255)  NOT NULL,
4505 DESCRIPTION     VARCHAR2 (4000),
4507 OWNER_ID        NUMBER (8)     NOT NULL,
4509 TYPE            VARCHAR2 (12)  NOT NULL,
     MIMETYPE        VARCHAR2 (32)  NOT NULL,
     FILESIZE        NUMBER (12)    DEFAULT 0,
     VERSION         NUMBER (3,1)   DEFAULT 1 NOT NULL,
4511 URL             VARCHAR2 (4000)  NOT NULL,
     CREATED_DATE    DATE           DEFAULT SYSDATE,
     UPDATED_DATE    DATE           DEFAULT NULL,
     DELETED         NUMBER (1)     DEFAULT 0 NOT NULL,
4513 OBJECTIVE_ID    NUMBER (12),
     FILTER_USER     VARCHAR2 (20)  DEFAULT USER NOT NULL,
     UNIQUE (ID) ) ;
```

4221

```
CREATE TABLE T_MESSAGE (
4515 MESSAGE_ID         NUMBER (8)     NOT NULL,
     MESSAGE_SUBJECT    VARCHAR2 (255),
     MESSAGE_BODY       VARCHAR2 (1000),
4517 MESSAGE_SIZE       NUMBER (12),
     OWNER_USER_ID      NUMBER (8),
     CREATED_DATE       DATE           DEFAULT SYSDATE,
     UPDATED_DATE       DATE,
     FILTER_USER        VARCHAR2 (20)  DEFAULT USER NOT NULL,
     CONSTRAINT MESSAGE_PK
     PRIMARY KEY ( MESSAGE_ID ) ) ;
```

4225

Fig. 45

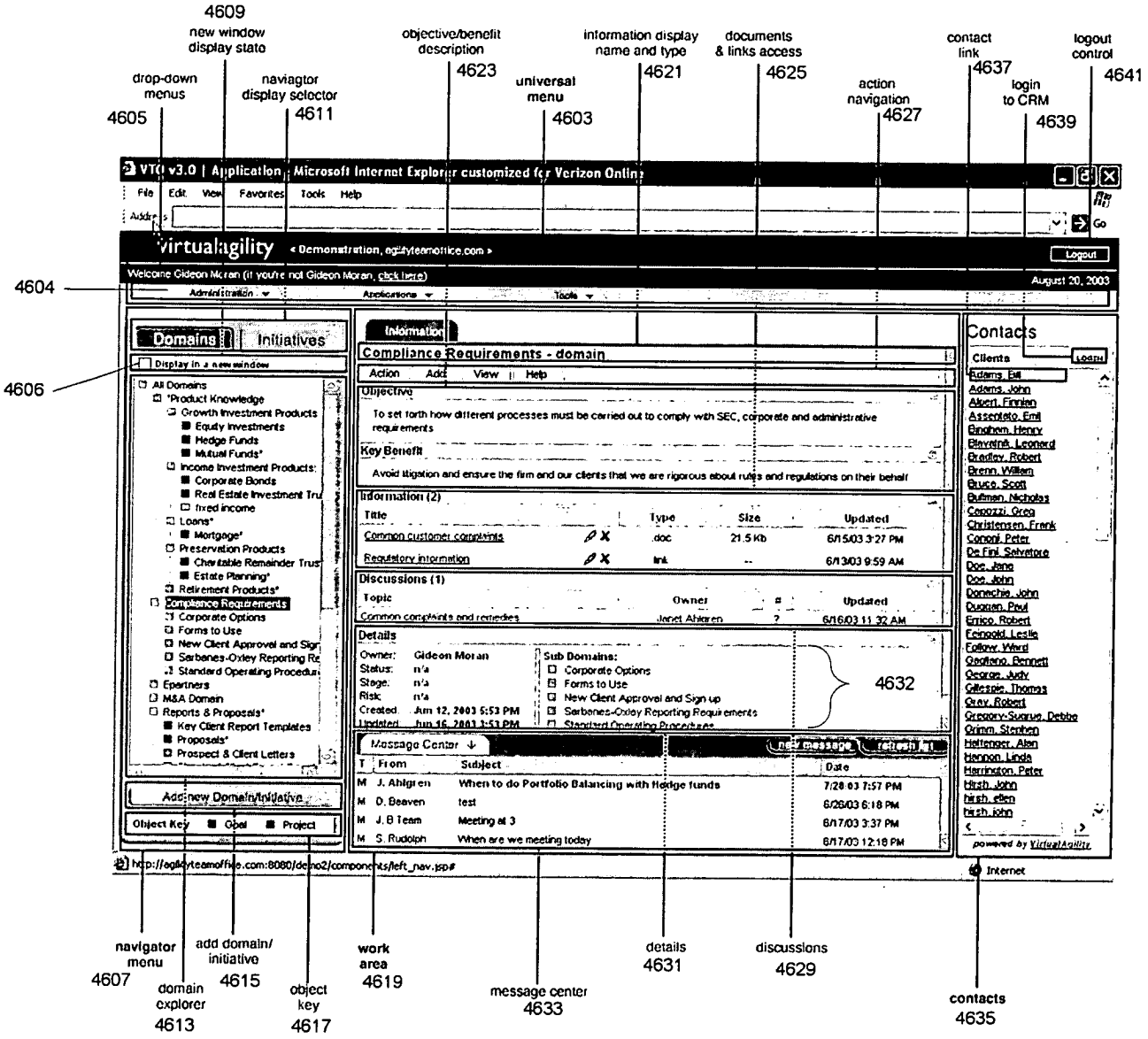
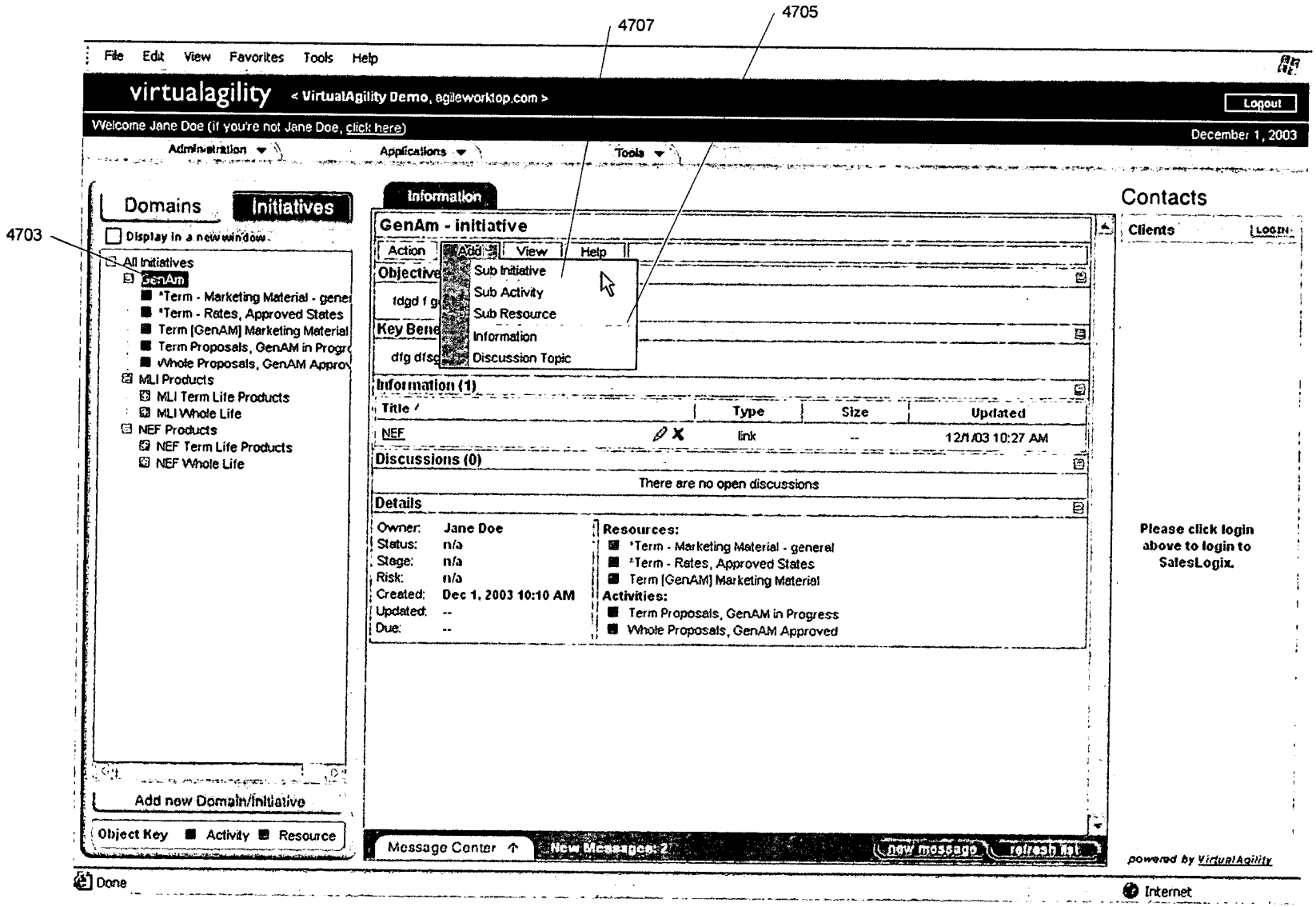

4609
new window display state
drop-down menus
4605
naviagtor display selector
4611
objective/benefit description
4623
universal menu
4603
information display name and type
4621
documents & links access
4625
action navigation
4627
contact link
4637
login to CRM
4639
logout control
4641
4604
4606
virtualagility
Compliance Requirements - domain
Contacts
4632
navigator menu
4607
domain explorer
4613
add domain/ initiative
4615
object key
4617
work area
4619
message center
4633
details
4631
discussions
4629
contacts
4635
4601

Fig. 46


4707
4705
4703
File Edit View Favorites Tools Help
virtualagility
< VirtualAgility Demo, agileworktop.com >
Logout
Welcome Jane Doe (if you're not Jane Doe, click here)
December 1, 2003
Administration
Applications
Tools
Domains
Initiatives
Display in a new window
All Initiatives
GenAm
*Term - Marketing Material - gener
*Term - Rates, Approved States
Term [GenAM] Marketing Material
Term Proposals, GenAM in Progr
Whole Proposals, GenAM Approv
MLI Products
MLI Term Life Products
MLI Whole Life
NEF Products
NEF Term Life Products
NEF Whole Life
Add new Domain/Initiative
Object Key
Activity
Resource
Information
GenAm - initiative
Action
Add
View
Help
Objective
fdgd f g
Sub Initiative
Sub Activity
Sub Resource
Information
Discussion Topic
Key Bene
dfg dfsg
Information (1)
Title
Type
Size
Updated
NEF
link
--
12/1/03 10:27 AM
Discussions (0)
There are no open discussions
Details
Owner: Jane Doe
Status: n/a
Stage: n/a
Risk: n/a
Created: Dec 1, 2003 10:10 AM
Updated: --
Due: --
Resources:
*Term - Marketing Material - general
*Term - Rates, Approved States
Term [GenAM] Marketing Material
Activities:
Term Proposals, GenAM in Progress
Whole Proposals, GenAM Approved
Message Center
New Messages: 2
new message
refresh list
Contacts
Clients
LOGIN
Please click login above to login to SalesLogix.
powered by VirtualAgility
Done
Internet

4701

Fig. 47

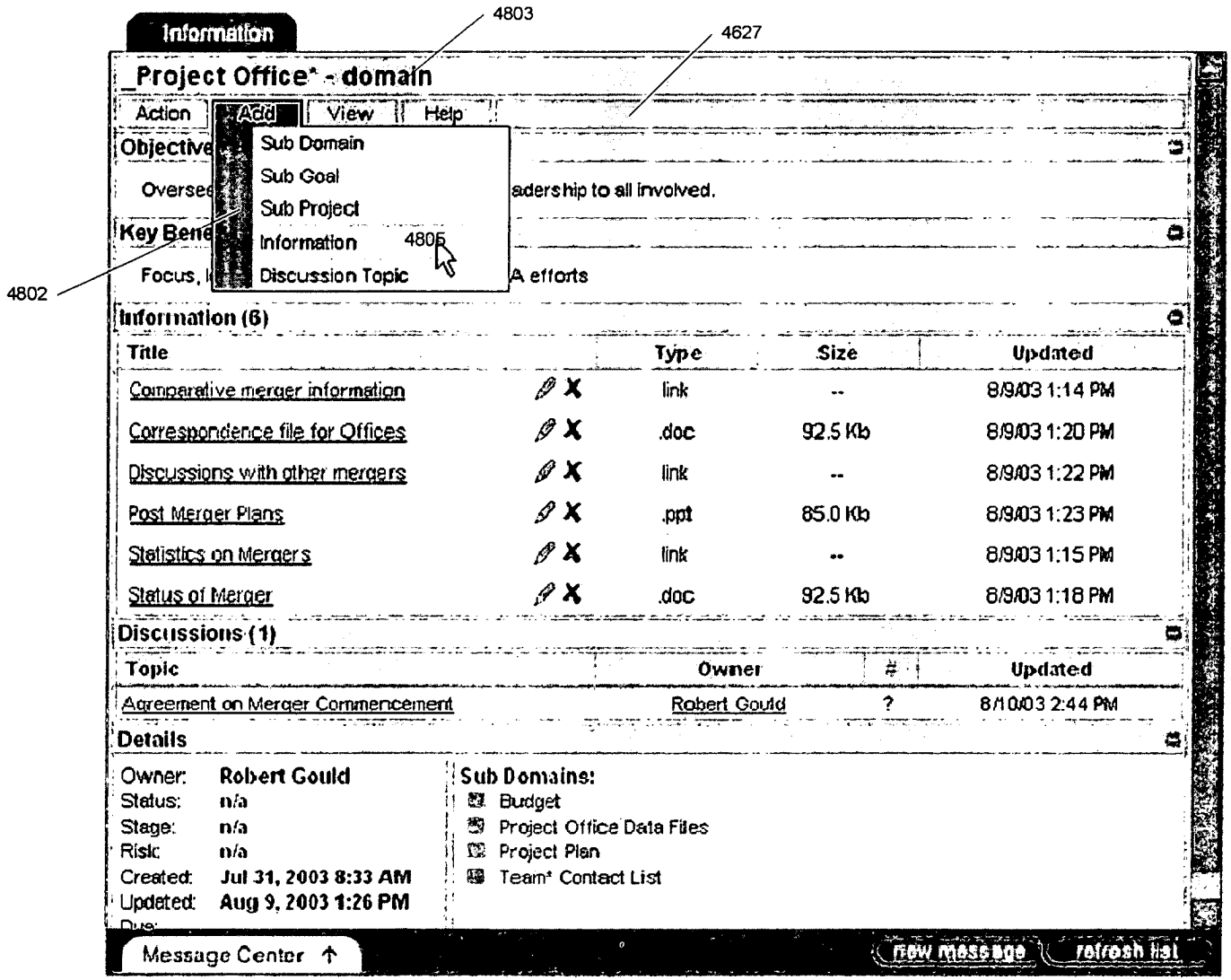

Information
4803
4627
_Project Office* - domain
Action
Add
View
Help
Objective
Sub Domain
Sub Goal
Sub Project
Information
4805
Discussion Topic
adership to all involved.
Key Bene
Focus,
A efforts
4802
Information (6)
Title
Type
Size
Updated
Comparative merger information
link
--
8/9/03 1:14 PM
Correspondence file for Offices
.doc
92.5 Kb
8/9/03 1:20 PM
Discussions with other mergers
link
--
8/9/03 1:22 PM
Post Merger Plans
.ppt
85.0 Kb
8/9/03 1:23 PM
Statistics on Mergers
link
--
8/9/03 1:15 PM
Status of Merger
.doc
92.5 Kb
8/9/03 1:18 PM
Discussions (1)
Topic
Owner
#
Updated
Agreement on Merger Commencement
Robert Gould
?
8/10/03 2:44 PM
Details
Owner: Robert Gould
Status: n/a
Stage: n/a
Risk: n/a
Created: Jul 31, 2003 8:33 AM
Updated: Aug 9, 2003 1:26 PM
Sub Domains:
Budget
Project Office Data Files
Project Plan
Team* Contact List
Message Center
new message
refresh list
4801

Fig. 48

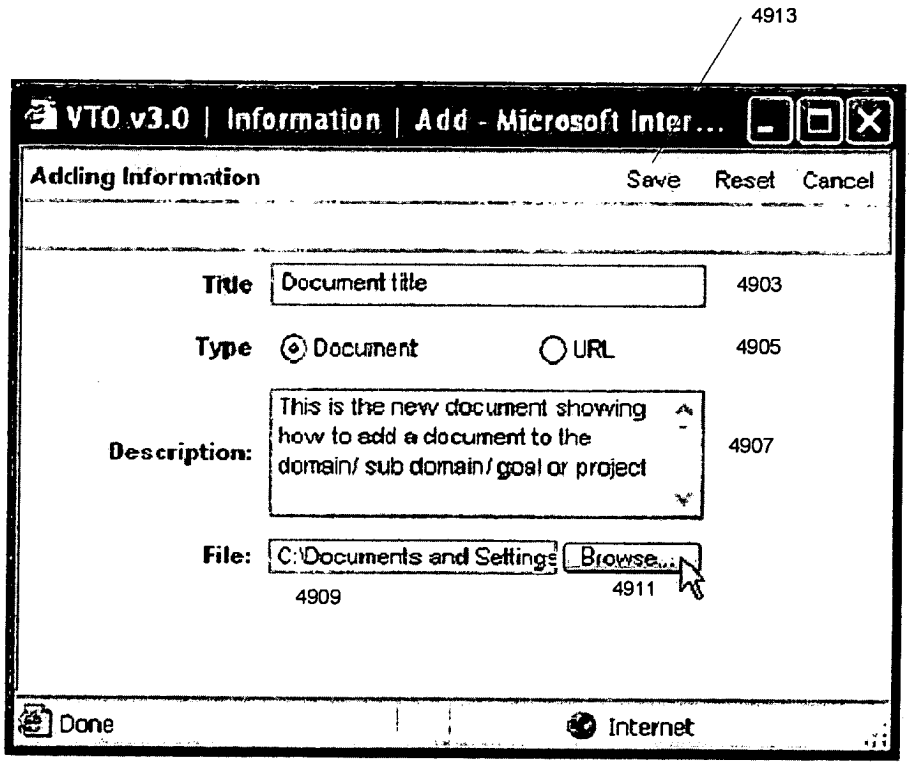
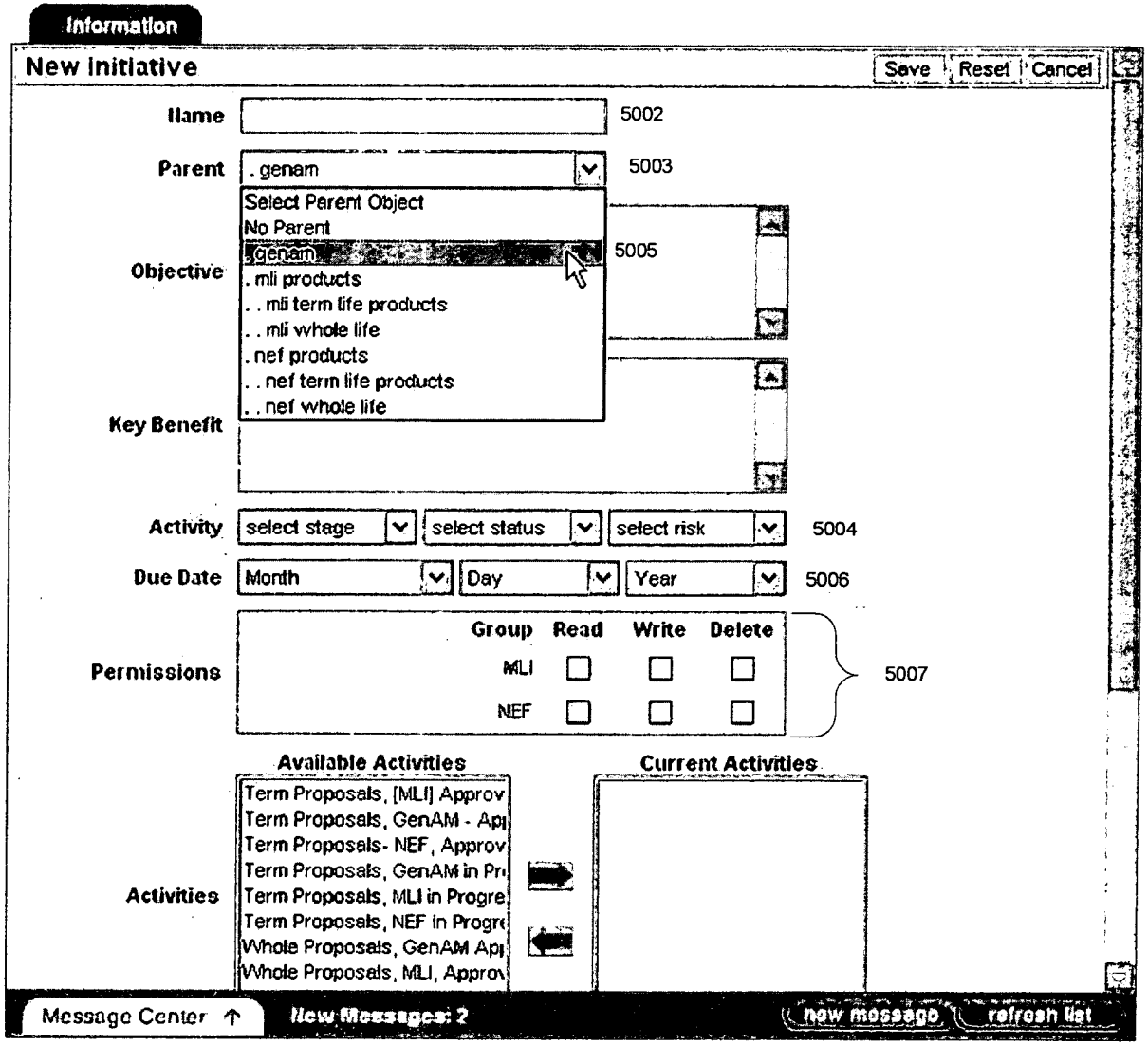
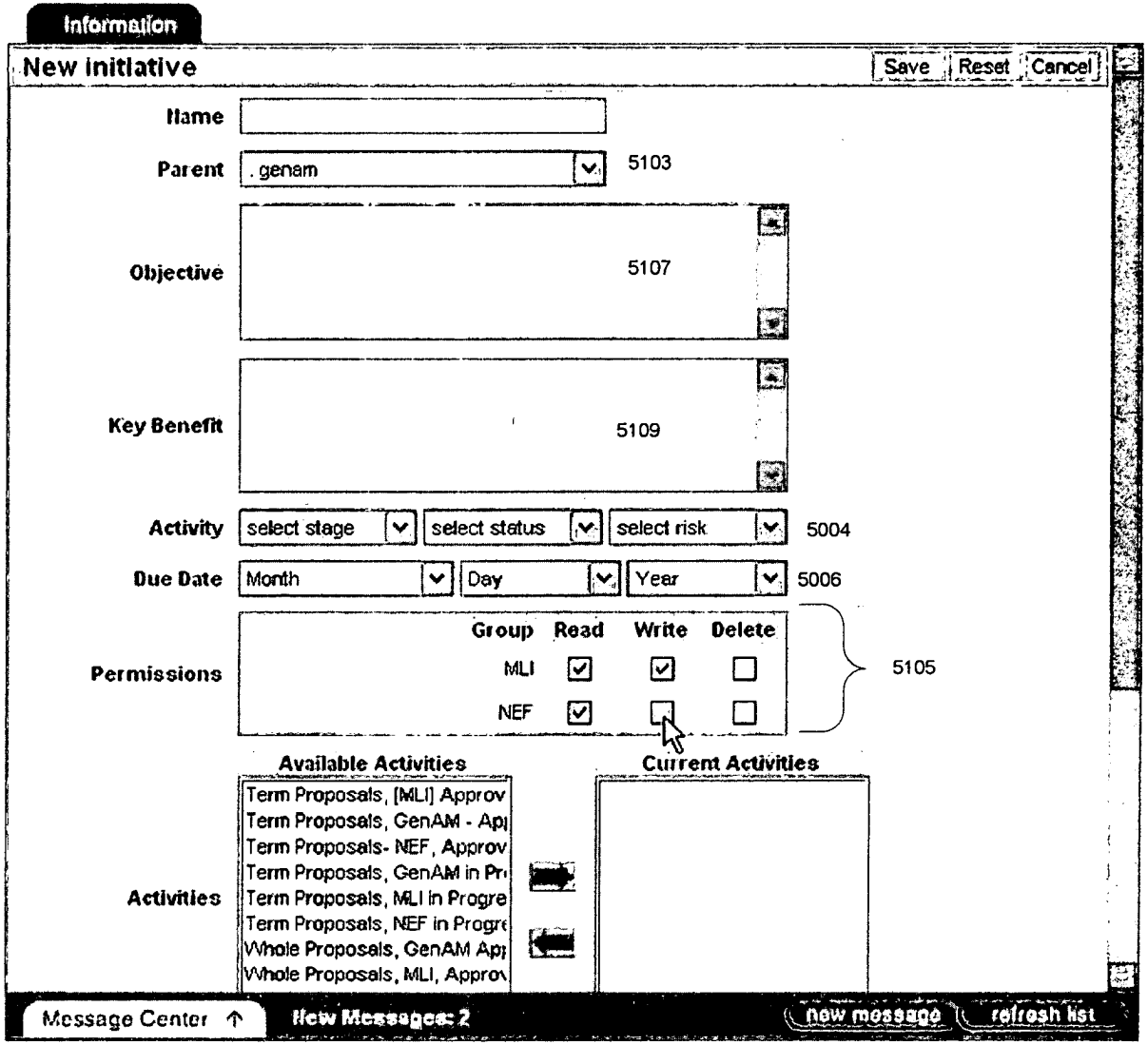

4913
VTO v3.0 | Information | Add - Microsoft Inter...
Adding Information
Save
Reset
Cancel
Title
Document title
4903
Type
Document
URL
4905
Description:
This is the new document showing how to add a document to the domain/ sub domain/ goal or project
4907
File:
C:\Documents and Settings
Browse...
4909
4911
Done
Internet
4901

Fig. 49


Information
New Initiative
Save
Reset
Cancel
Name
5002
Parent
. genam
5003
Select Parent Object
No Parent
. genam
. mli products
. . mli term life products
. . mli whole life
. nef products
. . nef term life products
. . nef whole life
Objective
5005
Key Benefit
Activity
select stage
select status
select risk
5004
Due Date
Month
Day
Year
5006
Permissions
Group
Read
Write
Delete
MLI
NEF
5007
Available Activities
Current Activities
Activities
Term Proposals, [MLI] Approv
Term Proposals, GenAM - Ap
Term Proposals- NEF, Approv
Term Proposals, GenAM in Pr
Term Proposals, MLI in Progre
Term Proposals, NEF in Progr
Whole Proposals, GenAM Ap
Whole Proposals, MLI, Approv
Message Center
New Messages: 2
new message
refresh list

5001

Fig. 50


Information
New initiative
Save
Reset
Cancel
Name
Parent
genam
5103
Objective
5107
Key Benefit
5109
Activity
select stage
select status
select risk
5004
Due Date
Month
Day
Year
5006
Permissions
Group
Read
Write
Delete
MLI
NEF
5105
Available Activities
Current Activities
Activities
Term Proposals, [MLI] Approv
Term Proposals, GenAM - Apj
Term Proposals- NEF, Approv
Term Proposals, GenAM in Pr
Term Proposals, MLI in Progre
Term Proposals, NEF in Progr
Whole Proposals, GenAM Apj
Whole Proposals, MLI, Approv
Message Center
New Messages: 2
new message
refresh list

5101

Fig. 51

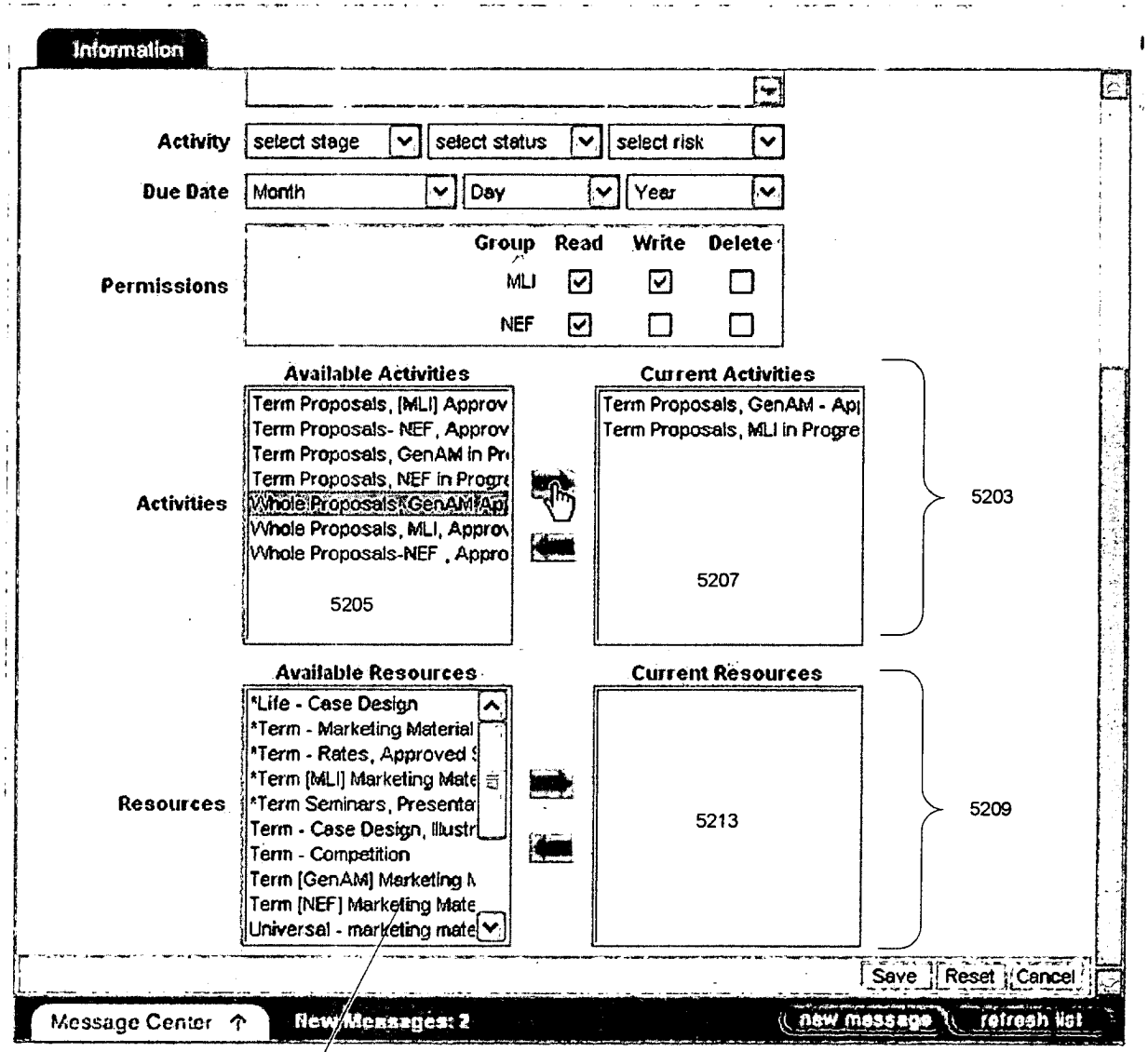
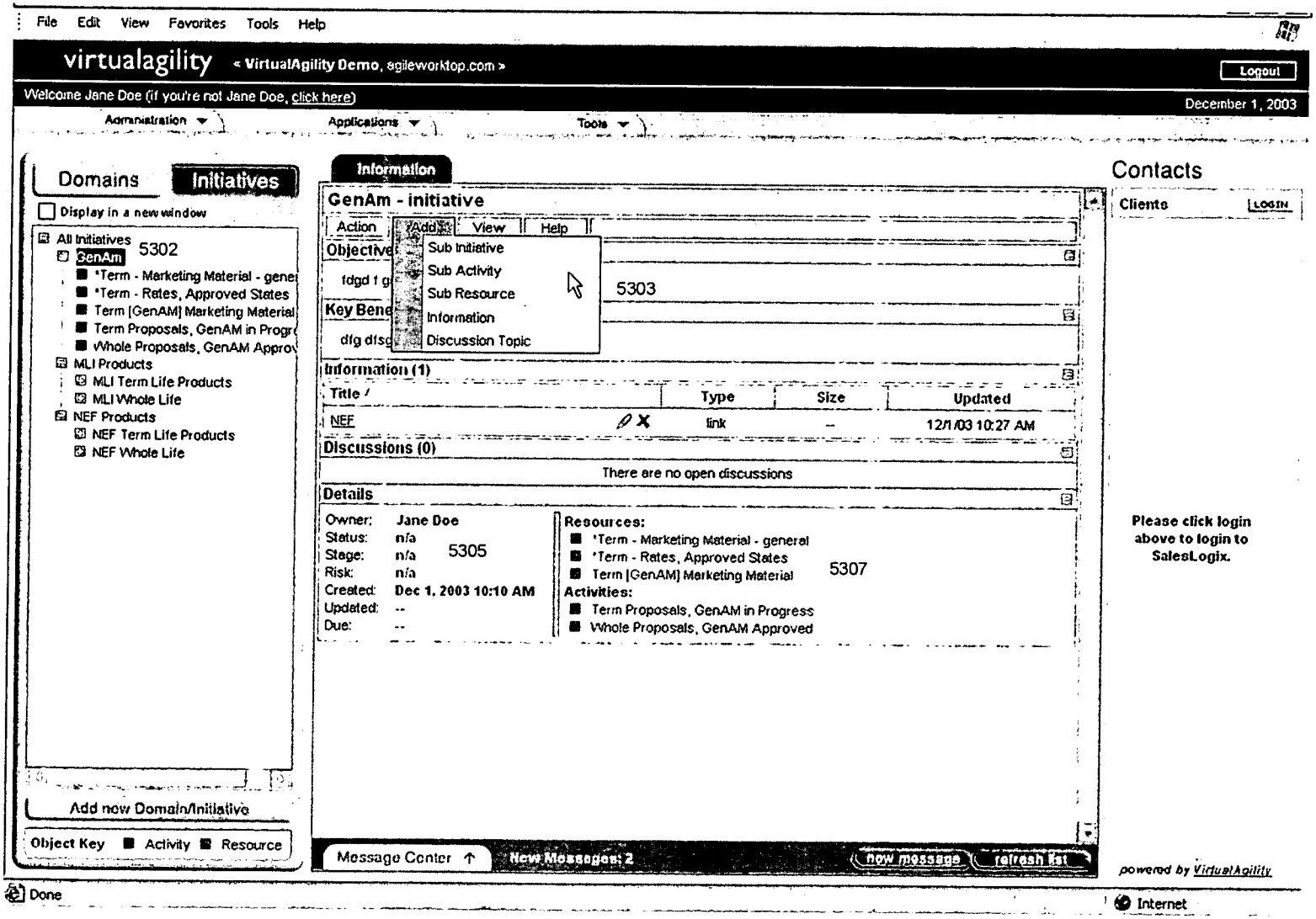
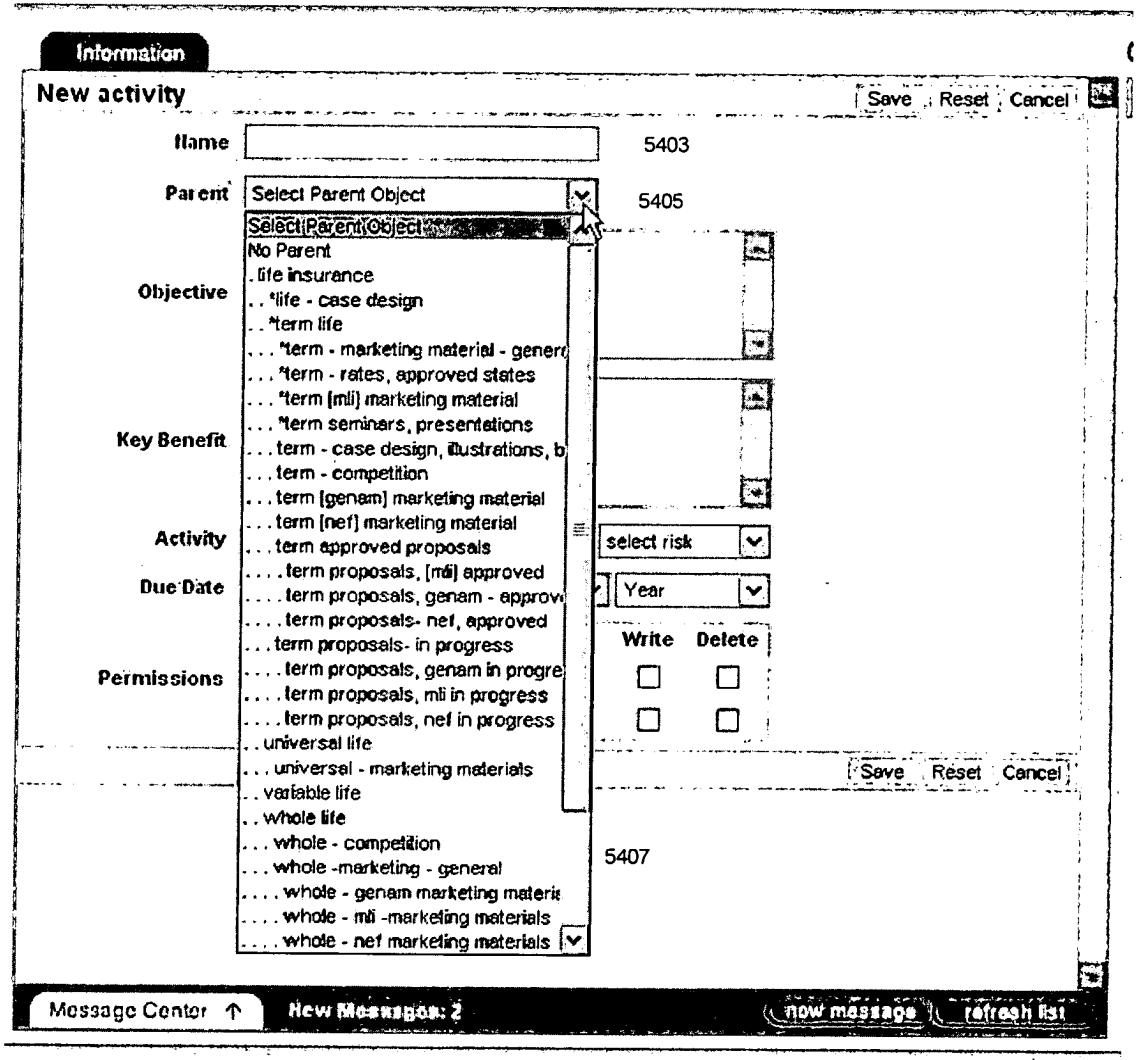

Information
Activity
select stage
select status
select risk
Due Date
Month
Day
Year
Permissions
Group
Read
Write
Delete
MLI
NEF
Available Activities
Current Activities
Activities
Term Proposals, [MLI] Approv
Term Proposals- NEF, Approv
Term Proposals, GenAM in Pr
Term Proposals, NEF in Progr
Whole Proposals, GenAM Ap
Whole Proposals, MLI, Approv
Whole Proposals-NEF , Appro
5205
Term Proposals, GenAM - Ap
Term Proposals, MLI in Progre
5207
5203
Available Resources
Current Resources
Resources
*Life - Case Design
*Term - Marketing Material
*Term - Rates, Approved
*Term [MLI] Marketing Mate
*Term Seminars, Presenta
Term - Case Design, Illustr
Term - Competition
Term [GenAM] Marketing M
Term [NEF] Marketing Mate
Universal - marketing mate
5213
5209
Save
Reset
Cancel
Message Center
New Messages: 2
new message
refresh list
5201
5211

Fig. 52


File Edit View Favorites Tools Help
virtualagility « VirtualAgility Demo, agileworktop.com »
Logout
Welcome Jane Doe (if you're not Jane Doe, click here)
December 1, 2003
Administration
Applications
Tools
Domains
Initiatives
Display in a new window
All Initiatives
GenAm 5302
*Term - Marketing Material - gener
*Term - Rates, Approved States
Term [GenAM] Marketing Material
Term Proposals, GenAM in Progr
Whole Proposals, GenAM Appro
MLI Products
MLI Term Life Products
MLI Whole Life
NEF Products
NEF Term Life Products
NEF Whole Life
Add new Domain/Initiative
Object Key Activity Resource
Information
GenAm - initiative
Action Add View Help
Sub Initiative
Sub Activity
Sub Resource
Information
Discussion Topic
Objective
fdgd f g
5303
Key Bene
dfg dfsg
Information (1)
Title
Type
Size
Updated
NEF
link
12/1/03 10:27 AM
Discussions (0)
There are no open discussions
Details
Owner: Jane Doe
Status: n/a
Stage: n/a
5305
Risk: n/a
Created: Dec 1, 2003 10:10 AM
Updated: --
Due: --
Resources:
*Term - Marketing Material - general
*Term - Rates, Approved States
Term [GenAM] Marketing Material
5307
Activities:
Term Proposals, GenAM in Progress
Whole Proposals, GenAM Approved
Message Center
New Messages: 2
new message
refresh list
Contacts
Clients
LOGIN
Please click login above to login to SalesLogix.
powered by VirtualAgility
Done
Internet

5301

Fig. 53


Information
New activity
Save
Reset
Cancel
Name
5403
Parent
Select Parent Object
5405
Objective
Key Benefit
Activity
Due Date
Permissions
select risk
Year
Write
Delete
Save
Reset
Cancel
5407
Select Parent Object
No Parent
. life insurance
. . *life - case design
. . *term life
. . . *term - marketing material - generi
. . . *term - rates, approved states
. . . *term [mli] marketing material
. . . *term seminars, presentations
. . . term - case design, illustrations, b
. . . term - competition
. . . term [genam] marketing material
. . . term [nef] marketing material
. . . term approved proposals
. . . . term proposals, [mli] approved
. . . . term proposals, genam - approvi
. . . . term proposals- nef, approved
. . . term proposals- in progress
. . . . term proposals, genam in progre
. . . . term proposals, mli in progress
. . . . term proposals, nef in progress
. . universal life
. . . universal - marketing materials
. . variable life
. . whole life
. . . whole - competition
. . . whole -marketing - general
. . . . whole - genam marketing materi
. . . . whole - mli -marketing materials
. . . . whole - nef marketing materials
Message Center
New Messages: 2
new message
refresh list

5401

Fig. 54

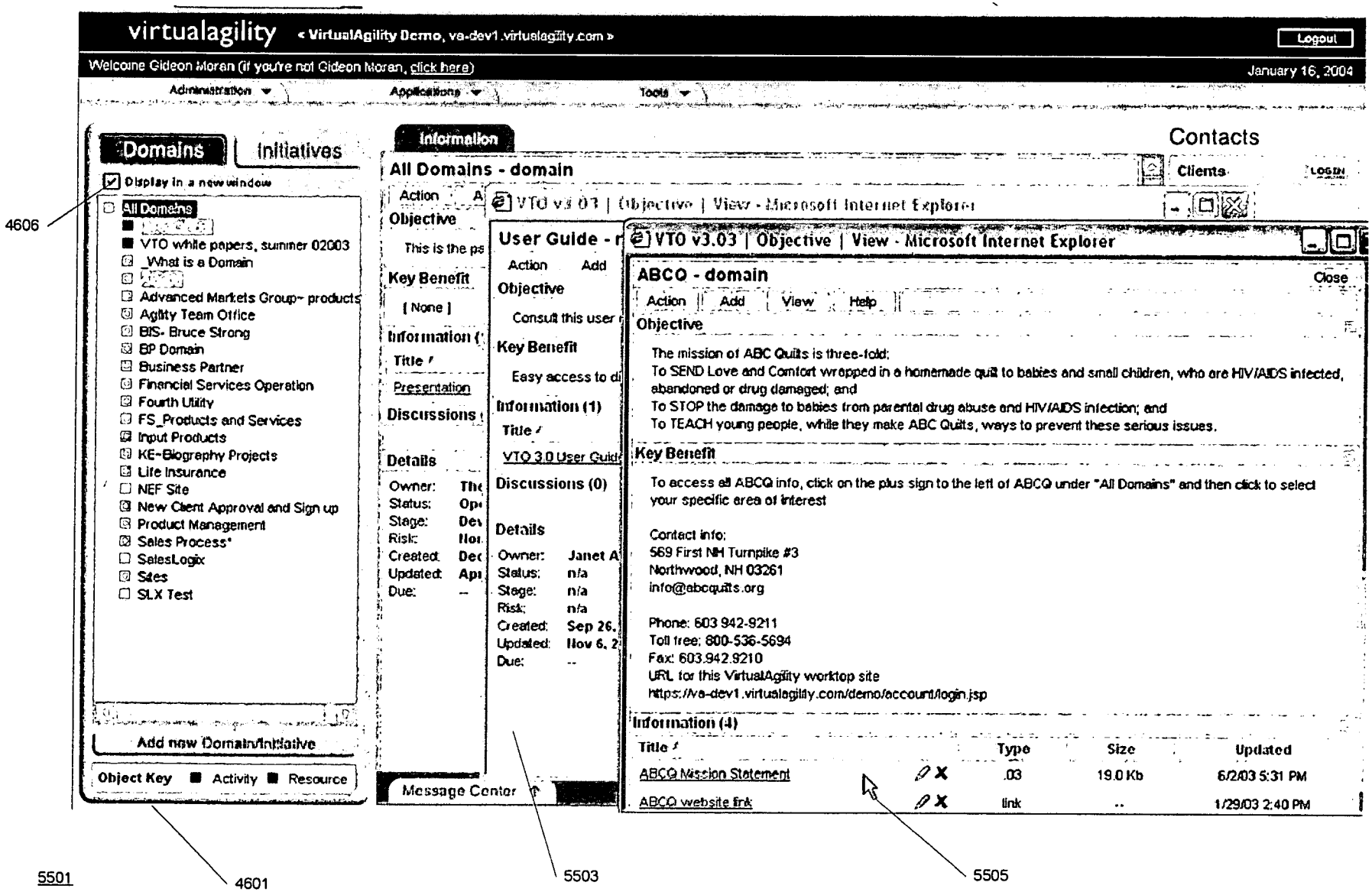
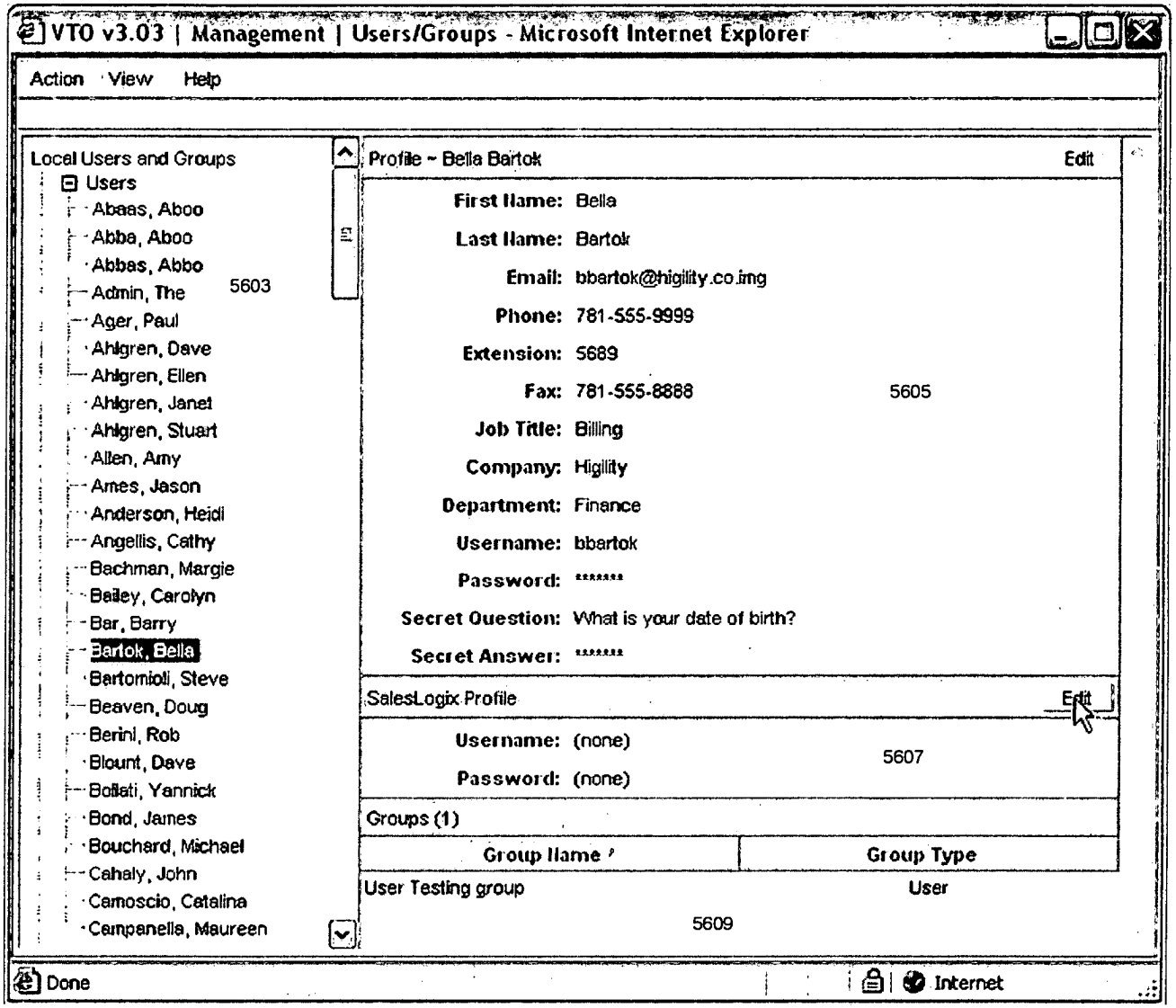

virtualagility
« VirtualAgility Demo, va-dev1.virtualagility.com »
Logout
Welcome Gideon Moran (if you're not Gideon Moran, click here)
January 16, 2004
Administration
Applications
Tools
Domains
Initiatives
Display in a new window
All Domains
VTO white papers, summer 02003
_What is a Domain
Advanced Markets Group- products
Agility Team Office
BIS- Bruce Strong
BP Domain
Business Partner
Financial Services Operation
Fourth Utility
FS_Products and Services
Input Products
KE-Biography Projects
Life Insurance
NEF Site
New Client Approval and Sign up
Product Management
Sales Process*
SalesLogix
Sales
SLX Test
Add new Domain/Initiative
Object Key
Activity
Resource
Information
All Domains - domain
Action
Objective
This is the ps
Key Benefit
[None]
Information (
Title
Presentation
Discussions
Details
Owner:
Status:
Stage:
Risk:
Created:
Updated:
Due:
Message Center
Contacts
Clients
LOGIN
VTO v3.03 | Objective | View - Microsoft Internet Explorer
User Guide -
Action
Add
Objective
Consult this user
Key Benefit
Easy access to di
Information (1)
Title
VTO 3.0 User Guid
Discussions (0)
Details
Owner: Janet A
Status: n/a
Stage: n/a
Risk: n/a
Created: Sep 26,
Updated: Nov 6, 2
Due: --
VTO v3.03 | Objective | View - Microsoft Internet Explorer
ABCQ - domain
Close
Action
Add
View
Help
Objective
The mission of ABC Quilts is three-fold:
To SEND Love and Comfort wrapped in a homemade quilt to babies and small children, who are HIV/AIDS infected, abandoned or drug damaged; and
To STOP the damage to babies from parental drug abuse and HIV/AIDS infection; and
To TEACH young people, while they make ABC Quilts, ways to prevent these serious issues.
Key Benefit
To access all ABCQ info, click on the plus sign to the left of ABCQ under "All Domains" and then click to select your specific area of interest
Contact info:
569 First NH Turnpike #3
Northwood, NH 03261
info@abcquilts.org
Phone: 603 942-9211
Toll free: 800-536-5694
Fax: 603.942.9210
URL for this VirtualAgility worktop site
https://va-dev1.virtualagility.com/demo/account/login.jsp
Information (4)
Title
Type
Size
Updated
ABCQ Mission Statement
.03
19.0 Kb
6/2/03 5:31 PM
ABCQ website link
link
--
1/29/03 2:40 PM
4606
5501
4601
5503
5505

Fig. 55


VTO v3.03 | Management | Users/Groups - Microsoft Internet Explorer
Action View Help
Local Users and Groups
Users
Abaas, Aboo
Abba, Aboo
Abbas, Abbo
Admin, The
Ager, Paul
Ahlgren, Dave
Ahlgren, Ellen
Ahlgren, Janet
Ahlgren, Stuart
Allen, Amy
Ames, Jason
Anderson, Heidi
Angellis, Cathy
Bachman, Margie
Bailey, Carolyn
Bar, Barry
Bartok, Bella
Bartomioli, Steve
Beaven, Doug
Berini, Rob
Blount, Dave
Bollati, Yannick
Bond, James
Bouchard, Michael
Cahaly, John
Camoscio, Catalina
Campanella, Maureen
5603
Profile ~ Bella Bartok
Edit
First Name: Bella
Last Name: Bartok
Email: bbartok@higility.co.img
Phone: 781-555-9999
Extension: 5689
Fax: 781-555-8888
5605
Job Title: Billing
Company: Higility
Department: Finance
Username: bbartok
Password: *******
Secret Question: What is your date of birth?
Secret Answer: *******
SalesLogix Profile
Edit
Username: (none)
Password: (none)
5607
Groups (1)
Group Name
Group Type
User Testing group
User
5609
Done
Internet

5601

Fig. 56